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Quantico, Virginia 22134-5068*

MASTER OF MILITARY STUDIES

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THE HYBRID APPROACH: HOW STRATEGIC COMPETITORS HAVE CHANGED  
THE CHARACTER OF WAR

SUBMITTED IN PARTIAL FULLFILLMENT  
OF THE REQUIREMENTS FOR THE DEGREE OF  
MASTER OF MILITARY STUDIES

MAJ VALERIE A. MCGUIRE

AY 2017-18

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## Executive Summary

**Title:** The Hybrid Approach: How Strategic Competitors have changed the Character of War

**Author:** Major Valerie A. McGuire, United States Marine Corps

**Thesis:** Unable to compete with the massive defense budget of the United States, expansive military-industrial complex, and technological advancements in the fields of aviation, intelligence, surveillance, and reconnaissance, cyber, and electronic warfare, non-state actors and emerging peer adversaries increasingly seek alternative, low-cost, and inventive ways to counter US influence and power in the international arena.

**Discussion:** To level the playing field against superior military and economic rivals, peer competitors such as Russia are changing the character of war by engaging in Hybrid Warfare and employing a fusion of indirect, asymmetric, and non-lethal methods in concert with conventional military capabilities to influence the operating environment often in the Gray Zone between traditional peace and war contexts. Divided into two chapters, this essay will discuss the changes in the operating environment since the fall of the Soviet Union and end of the Cold War era and efforts by Russia to destabilize and delegitimize the United States and its North Atlantic Treaty Organization (NATO) allies through the effective application of unconventional means across all domains of warfare, but particularly within cyberspace and information.

The first chapter, “Ancient Origins, Modern Techniques: Why ‘Hybrid’ is the Warfare of the Ages,” focuses on the changing character of war as peer adversaries and non-state actors increasingly challenge competitors with an array of capabilities just below the threshold of formal war. While a common definition of Hybrid Warfare is lacking within the Department of Defense, the essay seeks to establish a baseline understanding of the tactics and strategies being employed across the range of military operations. Finally, it provides historical examples of the use of hybrid tactics to gain and advantage and assesses how globalization, technology proliferation, and the rise of social networking as a tool to inform, influence, and manipulate target audiences have contributed to the complexity and effectiveness of modern techniques.

The second chapter, “Hybrid Warfare: Russia’s Strategy to Alter the International Balance of Power,” focuses on Russian doctrine and strategy with particular attention to the ideas espoused by Chief of the Russian General Staff Valery Gerasimov in the 2013 article, “The Value of Science Is in the Foresight: New Challenges Demand Rethinking the Forms and Methods of Carrying out Combat Operations.” The essay discusses Russian President Vladimir Putin’s employment of Hybrid Warfare tactics as a means to destabilize and delegitimize the United States while masking his inability to generate increases in the country’s Gross Domestic Product to support his Strategic Armament Program and rebuilding of Russia’s conventional military capabilities. Finally, it provides an assessment of Russia’s actions in Crimea and Eastern Ukraine as examples of

Putin employing a calculated fusion of indirect, asymmetric, and non-lethal methods to achieve political and strategic objectives within the Gray Zone.

**Conclusion:** The methods most likely to be employed by non-state actors and peer adversaries include an arsenal of Hybrid Warfare tactics that, if not challenged, have the potential to destabilize the international balance of power. With its focus on asymmetric and unconventional tactics employed in the Gray Zone between traditional peace and war paradigms, Hybrid Warfare seems to be the new normal in countering Western democracy and US global influence.

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## **Ancient Origins, Modern Techniques: Why ‘Hybrid’ is the Warfare of the Ages**

This is another type of war, new in its intensity, ancient in its origin—war by guerrillas, subversives, insurgents, assassins, war by ambush instead of by combat; by infiltration, instead of aggression, seeking victory by eroding and exhausting the enemy instead of engaging him.

—President John F. Kennedy, 1962 West Point Speech

### *Introduction*

Since the collapse and dissolution of the Soviet Union in 1991, the United States has enjoyed relatively unparalleled global influence and military dominance. The end of the Cold War marked a period of transition within the Department of Defense (DOD) as senior political and military leaders sought to reprioritize defense spending and redefine national military strategy in an era where containment and deterrence of communism and Soviet aggression were no longer a requirement. As the personnel end strength of the United States armed services ebbed and flowed in response to emerging threats, so too did the defense budget in support of training and equipping those forces to counter the adversaries attempting to influence and threaten the strategic landscape of the twenty-first century. The global war on terrorism and rise of non-state actors such as the Taliban in Afghanistan and al-Qaeda in the Arabian Peninsula (AQAP) propelled the DOD to transition manpower and fiscal resources toward innovation with the rapid development and employment of advanced technological capabilities to meet the demands of an uncertain and chaotic operating environment. Military appropriations soared in the years following the 2001 attacks on the World Trade Center in New York, with the US Federal Government approving increases to defense spending from \$418 billion to roughly \$611 billion in a span of fifteen years—an amount surpassing the military spending of peer

adversaries such as China, Iran, and Russia almost tenfold.<sup>1</sup>

Unable to compete with the massive defense budget of the United States, expansive military-industrial complex, and technological advancements in the fields of aviation, intelligence, surveillance, and reconnaissance, cyber, and electronic warfare, non-state actors and emerging peer adversaries increasingly seek alternative, low-cost, and inventive ways to counter US influence and power in the international arena. To level the playing field against superior military and economic rivals, competitors such as Russia and China are changing the character of war by engaging in Hybrid Warfare and employing a fusion of indirect, asymmetric, and non-lethal methods in concert with conventional military capabilities to influence the operating environment often in the Gray Zone between traditional peace and war contexts. As the character of war continues to change, military practitioners must examine the roots of Hybrid Warfare and develop an increased understanding of the evolving dynamic and ambiguously complex capabilities state actors and non-state organizations will likely continue to employ as a means to destabilize and delegitimize the United States in order to achieve their strategic objectives.

### *War of the Ages*

The nature of war, as articulated by Prussian military thinker and strategist General Carl von Clausewitz in his 1832 publication of *On War*, remains relatively similar in the twenty-first century to the way he defined it nearly 200 years ago. In *The Changing Character of War*, Thomas X. Hammes acknowledges, “war will continue to be driven by Clausewitz’s primary trinity of violence, chance, and reason. Fog and friction will remain a constant element in conflict and must never be assumed away.

What will change, however, is the character of war—how it is fought.”<sup>2</sup> Increasingly capable non-state actors and peer adversaries are changing the ways and means politics and policies are employed to force strategic competitors such as the United States to bend to their will. The Defense Department, in its 2016 release of *Joint Operating Concept 2035: The Joint Force in a Contested and Disordered World*, assesses:

The United States will likely see a number of states that can generate military advantages locally in ways that match or even exceed that of the Joint Force and its partners. US superiority in high-tech warfare will be met by asymmetric, unconventional, and hybrid responses from adversaries, as opposed to countering the United States on a technology-by-technology and platform-by-platform basis.<sup>3</sup>

As competitors seek to manipulate the strategic landscape, changing the character of war through the employment of irregular, asymmetric, and unconventional tactics often below the threshold of formal war, US political and military leaders must reevaluate defense spending and its over-reliance on technological and military dominance to meet the twenty-first century challenges associated with Hybrid Warfare. Clausewitz describes in *On War* that, “Every age has its own kind of war, its own limiting conditions, and its own peculiar preconceptions.”<sup>4</sup> In this age, fiscal restraints, technology and weapons proliferation, and interconnectedness through globalization and information exchange will continue to shape the strategic landscape and contribute to the increased application of Hybrid Warfare tactics.

#### *Hybrid Warfare Defined—Maybe*

Despite widespread acknowledgment that Hybrid Warfare will be the dominant challenge confronting the United States and North Atlantic Treaty Organization (NATO) allies over the next decade and beyond, modern day military strategists and senior leaders across DOD have yet to agree on a common definition of Hybrid Warfare. In a 2010

Government Accounting Office briefing to the House Armed Services Committee, the DOD acknowledged the complexities of hybrid threats within the future operating environment, but had no intentions of formally defining Hybrid Warfare or incorporating the concept into defense strategic planning documents.<sup>5</sup> The US Army, however, believed a common understanding of the challenges and complexities associated with the future operating environment was significant enough that it directed the publication of Training Circular 7-100, *Hybrid Threat*, and defined hybrid threats as “the diverse and dynamic combination of regular forces, irregular forces, and/or criminal elements all unified to achieve mutually benefitting effects.”<sup>6</sup> A NATO Military Working Group similarly defined hybrid threats that same year, again stressing the synergistic employment of conventional military capabilities, asymmetric tactics, and unconventional warfare to achieve political and strategic objectives.

While Joint Publication 1-02 *Department of Defense Dictionary of Military and Associated Terms* provides separate and distinct definitions for asymmetric and unconventional warfare, the underlying premise behind the hybrid approach is the calculated fusion of various resources and capabilities directed to exploit an adversary’s weaknesses often below the threshold of war to gain an advantage and achieve strategic objectives. Frank G. Hoffman provided an inclusive definition in his 2009 article, “Hybrid Warfare and Challenges,” in which he articulated that both state and non-state actors will likely employ a combination of the following elements to destabilize and delegitimize superior economic and military powers:

[T]he adversary will most likely present unique combinational or hybrid threats specifically targeting US vulnerabilities. Instead of separate challengers with fundamentally different approaches (conventional, irregular, or terrorist), we can expect to face competitors who will employ all forms of war and tactics, perhaps

simultaneously. Criminal activity may also be considered part of this problem, as it either further destabilizes local government or abets the insurgent or irregular warrior by providing resources. This could involve smuggling, narcoterrorism, illicit transfers of advanced munitions or weapons, or the exploitation of urban gang networks.<sup>7</sup>

Despite that the lack of a singularly accepted definition of Hybrid Warfare across DOD, it should be clear is that it will be the dominant twenty-first century threat as state and non-state actors increasingly seek alternative methods across all domains of warfare—air, land, sea, space, cyber, and information—to challenge superior military and economic powers such as the United States. While recent actions by China and Russia to both overtly and covertly influence and manipulate the operating environment served as the catalyst for the renewed emphasis on hybrid tactics, the hybrid approach to destabilizing and delegitimizing competitors should not be viewed as a new form of warfare.

### *Something Old*

There has been significant debate amongst historians and military strategists over the past decade about the origins of Hybrid Warfare. A trove of articles published since the 2014 annexation of Crimea attribute Russia's asymmetric, unconventional, and irregular methods to regain possession of former Soviet territory and increase influence across Eastern Ukraine as a new, modern form of warfare. Peter R. Mansoor in *Hybrid Warfare: Fighting Complex Opponents from the Ancient World*, however, argues that the roots of Hybrid Warfare may be seen as far back as the Peloponnesian War in 431 BC when the Athenians set the conditions for and fueled a popular uprising in Helot—a strategic agricultural and military hub for the Spartans. The inclusion of an irregular dimension, coupled with Athens' conventional military tactics and capabilities,

overwhelmed the Spartans and resulted in their proposal for a peaceful negotiation of terms. For as Mansoor concludes, “insurgency represented a form of war for which the exceptional Spartan phalanxes were ill-suited.”<sup>8</sup>

Despite a historical lineage of hybrid tactics being intertwined with conventional military capabilities, to include the Soviet Union’s use of irregulars against Germany on the Eastern Front during World War II and China’s integration of similar tactics during the Second Sino-Japanese War, Elie Tenenbaum in “Hybrid Warfare in the Strategic Spectrum: An Historical Assessment,” states the term did not take root within the US Armed Forces until at least 2005. It was in “Future Warfare: The Rise of Hybrid Wars,” a *Proceedings* article written by now Secretary of Defense James Mattis and Hoffman as a precursor to the 2006 Quadrennial Defense Review (QDR), that Hybrid Warfare was mentioned as “a merger of different modes and means of war” and likely the dominant challenge to US forces in the future.<sup>9</sup> In their article, Mattis and Hoffman sought to challenge the current stove-piped thinking on how an adversary may fight, seeking to reframe the problem as an integrated, synergistic approach to countering the military and economic superiority of the United States. Despite insistence by Mattis, then in charge of Marine Corps Combat Development Command, and Hoffman that the Defense Department’s strategy and priorities should be focused on countering the complexities of hybrid threats, senior leaders at the Pentagon never included the term ‘hybrid’ in the 2006 QDR.

It was not until the 2006 Israeli-Hezbollah War that the Hybrid Warfare lexicon truly began to take root within the United States and NATO thinking and strategic dialogue.<sup>10</sup> The month-long conflict pitted the militarily superior Israeli Defense Force

(IDF) against Lebanese Hezbollah—a multi-faceted Shia Islamist political and military organization that serves as a modern example of the complexities and lethality of hybrid organizations. Matt Matthews in *We Were Caught Unprepared: The 2006 Hezbollah-Israel War* explains that from 2000-2006, Hezbollah successfully transformed its doctrine and principles of war “into a new and unique design” that capitalized on blending conventional and guerilla tactics to level the playing field and achieve its strategic objectives.<sup>11</sup> Against a superior nation state that maintained a massive military-industrial complex and the support of fellow NATO allies, Hezbollah achieved strategic victory over Israel and in the international arena by effectively employing a fusion of robust asymmetric tactics, unconventional warfare, and conventional military capabilities, to include a complement of nearly 15,000 short-, medium-, and long-range rockets provided by its anti-Israel allies, Iran and Syria.<sup>12</sup> The tactics and capabilities employed by Lebanese Hezbollah reaffirmed the lethality and effectiveness of Hybrid Warfare and would increasingly become routine for a variety of state and non-state actors seeking to delegitimize and destabilize superior military economic powers.

### *Something New*

While the roots of Hybrid Warfare can be traced back to early civilization, the sophisticated capabilities and tactics near-peer adversaries and non-state actors can employ have become increasingly effective and deadly with globalization and technology proliferation. The challenges associated with modern day Hybrid Warfare and increasingly complex and ambiguous tactics, techniques, and procedures employed are compounded by the blurred lines between traditional war and peace contexts in which near-peer adversaries such as Russia are employing them. State and non-state actors

increasingly engage in ambiguous and often non-attributable information operations, warfare by proxy, and economic, political, and cyber warfare to destabilize and delegitimize competitors such as the United States and NATO in the Gray Zone just shy of conventional war norms. Hoffman, in *The Contemporary Spectrum of Conflict: Protracted, Gray Zone, Ambiguous, and Hybrid Modes of War*, reasons “The term captures deliberate multidimensional activities by a state actor just below the threshold of aggressive use of military forces. In such conflicts, adversaries employ an integrated suite of national and subnational instruments of power in an ambiguous war to gain specified strategic objectives without crossing the threshold of overt conflict.”<sup>13</sup> This has proven to be particularly effective against superior competitors such as the United States and its NATO allies whose doctrine and philosophies clearly delineate distinct differences between war and peace. This method of influencing the operating environment is the new normal for peer adversaries as indicated by the military concepts and strategies developed and disseminated by Russian senior leaders within the past decade.

### *The New Normal*

Unable to compete with the massive defense spending budget of the United States, non-state actors and near-peer adversaries will seek alternative means to level the playing field and achieve their strategic objectives. According to a press release issued by the Defense Department, the United States Congress recently approved the fiscal year 2018 defense budget, appropriating a staggering \$700 billion which “is required to continue to rebuild warfighting readiness and will restore program balance by fixing the holes created by previous budget cuts.”<sup>14</sup> While the nearly \$100 billion increase will

ensure the United States maintains a force in readiness armed with highly technical, cutting-edge equipment, the increasing disparity between the United States and its adversaries may also contribute to an increase in hybrid tactics across all domains of warfare.

Mattis and Hoffman in their 2005 *Proceedings* article “Future Warfare: The Rise of Hybrid Wars” contend that the conventional superiority of the United States “creates a compelling logic for states and non-state actors to move out of the traditional mode of war and seek some niche capability of some unexpected combination of technologies and tactics to gain an advantage.”<sup>15</sup> They are clear that future war cannot be won by advanced weapons systems and technological advances alone. In addition to developing advanced weapons and armament and maintaining proficiency in conventional warfare tactics, the Defense Department must ensure it allocates sufficient time, resources, and training to understanding twenty-first century Hybrid Warfare challenges and how non-state and peer adversaries will manipulate the strategic landscape to achieve their objectives.

### **Hybrid Warfare: Russia’s Strategy to Alter the International Balance of Power**

What is a unipolar world? However one might embellish this term, at the end of the day it refers to one type of situation, namely one center of authority, one center of force, one center of decision-making. It is a world in which there is one master, one sovereign. And at the end of the day, this is pernicious not only for all those within this system, but also for the sovereign itself because it destroys itself from within ... Incidentally, Russia—we—are constantly being taught about democracy. But for some reason, those who teach us do not want to learn themselves.

—Russian President Vladimir Putin, 12 February 2007

## *Introduction*

For nearly sixteen years, the United States has been engaged in a seemingly endless whole-of-government campaign to counter the spread of terrorism and eliminate safe havens for terrorist organizations across South Asia and the Middle East. The attacks on the Pentagon and World Trade Center in 2001 served as the tipping point that transitioned US thinking and strategy from the great power politics espoused during the Cold War to a razor-sharp focus on counterterrorism and preventing another attack on the homeland. National defense spending soared in the years following the attacks, from more than \$300 billion in 2001 to nearly twice that amount just six years later as the United States sought to adequately train, equip, and deploy its military in the global fight against violent extremist ideology.<sup>16</sup> But even as US troops remain on the front lines embattled in a war against the Islamic State of Iraq and al-Sham (ISIS), Taliban, and al-Qaeda linked splinter cells in Iraq, Syria, and Afghanistan, US strategy and American dollars are shifting once again back to the great-power competition paradigm.

The 2018 National Defense Strategy (NDS), recently signed by Secretary of Defense Mattis states that for the first time in more than a decade, “Inter-state strategic competition, not terrorism, is now the primary concern in US national security.”<sup>17</sup> With a staggering \$700 billion defense budget authorized for fiscal year 2018—a fifteen percent increase over last year—Congress has provided the means for the Defense Department to invest billions in high-tech missile defense capabilities and overhaul nuclear deterrence programs to once again counter the threat imposed by the reemergence of strategic competition, namely China and Russia.

These peer competitors, it seems, may have a wildly different approach to countering the influence and power wielded by the United States, and Russia in particular has proved particularly adept at employing innovative ways to gain legitimacy, destabilize the operating environment, and level the playing field against superior military and economic powers such as the United States and its NATO allies. With a defense budget assessed at \$42 billion dollars in 2017—a mere six percent of the approved US Defense Department budget bill for 2018—Russian President Vladimir Putin has increasingly opted for developing and employing low-cost and often ambiguous Hybrid Warfare tactics as a way to make up for a lack of adequate funding to support his Strategic Armament Program (SAP).<sup>18</sup> This method of influencing the operating environment is the new normal for strategic competitors as indicated by the military concepts and strategies developed and disseminated by Russian senior leaders within the past decade and as demonstrated by Russia's actions in Crimea and Eastern Ukraine.

#### *Russia's Hybrid Technique*

Hybrid Warfare, often employed in the Gray Zone between traditional peace and war paradigms, is the synergetic fusion of asymmetric tactics, unconventional methods, and traditional instruments of power and influence applied seamlessly across and within every warfighting domain—air, land, sea, space, cyberspace, and information—to pursue national and strategic interests. While the Defense Department still lacks a universally accepted definition for Hybrid Warfare, a 2010 NATO Military Working Group summarized its assessment in *Hybrid Threats Description and Context* as the “threats posed by adversaries, with the ability to simultaneously employ conventional and non-conventional means adaptively in pursuit of their objectives.”<sup>19</sup> As ambiguous as the

definition may seem, it highlights the range of military and non-military capabilities—from cyber attacks, use of proxies, and energy politics to economic manipulation and covert employment of special operations forces—that may be employed by both state or non-state actors as they attempt to challenge the post World War II international order, gain legitimacy, and project power.

The uniqueness of Russia's application of Hybrid Warfare tactics is Putin's emphasis on manipulating the information environment and swaying public opinion to win favor for his objectives and ambivalence toward actions that may have otherwise caused international backlash and retribution. Melanie Amann et al., in the German magazine *Der Spiegel*, underscores this paradigm in the 2016 article "The Hybrid War: Russia's Propaganda Campaign Against Germany." Amann and her colleagues articulate that Russia's Hybrid Warfare strategy against Western democracy amounts to a "war without a formal declaration, rules or borders. The belligerent is anonymous, does not identify itself and often operates invisibly. Rather than weapons, fighting is done with words. The Internet is the most important battlefield."<sup>20</sup> As a low-cost and often ambiguous means to destabilize the unipolar post World War II international order, Putin's Hybrid Warfare approach relies heavily on information warfare to counter US economic and military supremacy.

### *Doctrine and Strategy*

The proof of this transition within Russia's doctrine and strategy can be found in a 2013 article published in the Russian military journal *Voyenno-Promyshlennyy Kurier* (VPK) (*Military-Industrial Kurier*). Written by General Valery Gerasimov, Chief of the General Staff of the Russian Federation Armed Forces, "The Value of Science Is in the

Foresight: New Challenges Demand Rethinking the Forms and Methods of Carrying out Combat Operations” outlines his perspective on the strategies of current and future warfare and prophesizes the actions that would later take place in Crimea and Eastern Ukraine. Often referred to as the Gerasimov Doctrine, the article highlights the evolution of Russian tactics to influence the operating environment with an emphasis on attaining political and strategic goals by breeding chaos and dissent within a disenfranchised population. Molly McKew in “The Gerasimov Doctrine” contends “Gerasimov took tactics developed by the Soviets, blended them with strategic military thinking about total war, and laid out a new theory of modern warfare—one that looks more like hacking an enemy’s society than attacking it head-on.”<sup>21</sup>

Gerasimov’s philosophy emphasizes Russia’s requirement to develop tactics, techniques, and procedures that can efficiently and effectively influence the operating environment while simultaneously avoiding the challenges of competing directly with the advanced technological capabilities and expansive military budget of countries like the United States. With unfavorable projected Gross Domestic Product growth limiting Russia’s defense spending over the next several years, Putin and his senior political and military strategists clearly understand that deficiencies in Russia’s conventional military capabilities and inability to meet the objectives within the SAP require the development of cost-effective alternatives to shaping the strategic environment prior to large-scale, conventional military operations.

Gerasimov asserts the evolution of Russian strategy and perspective in “The Value of Science” as follows:

The very ‘rules of war’ have changed. The role of nonmilitary means of achieving political and strategic goals has grown, and, in many cases, they have exceeded

the power of force of weapons in their effectiveness. The focus of applied methods of conflict has altered in the direction of the broad use of political, economic, informational, humanitarian, and other nonmilitary measures—applied in coordination with the protest potential of the population.<sup>22</sup>

Gerasimov contends that to be successful, the use of Hybrid Warfare tactics, specifically nonmilitary measures, must be employed at the ratio of four to one to traditional military capabilities, further highlighting Russia's commitment to applying all instruments of national power to ambiguously manipulate the operating environment just shy of traditional war contexts. Russia's evolving doctrine and strategy, as articulated by the Chief of the General Staff of the Russian Federation Armed Services, intends to destabilize and delegitimize competitors such as the United States and its NATO allies to ensure conditions are favorable for attaining political and strategic objectives and ultimately generate a paradigm shift in the balance of power within the international order.

By conducting an analysis of the strategy and tactics employed by the US military and its NATO allies over the past century, Chivvis in *Understanding Russian 'Hybrid Warfare'* contends that the Russian's "seized upon the importance of an approach that seeks to influence the population of target countries through information operations, proxy groups, and other influence operations. Russia uses Hybrid Warfare to work within existing political and social frameworks to further Russian objectives."<sup>23</sup> The Gerasimov Doctrine, while not prescriptive in nature, suggests a broad range of tools that can be employed to successfully achieve parity without resulting in the conventional application of military forces against superior powers. In addition to emphasizing the strategic importance of influencing the population, Russian Hybrid Warfare is characterized by the economic employment of conventional forces and the generation and

application of persistent pressure and chaos across the spectrum of both traditional peace and war paradigms.

*The Case of Crimea and Eastern Ukraine*

Putin successfully tested the concepts and strategy contained within Gerasimov's article in Crimea and Eastern Ukraine, exemplifying the complexity of unconventional and asymmetric Hybrid Warfare tactics that transcend traditional peace and war frameworks. Through the integrated and thorough employment of political, economic, and cyber warfare, infiltration of covert special operations forces, and an aggressive information operations campaign mirroring reflexive control (RC) theory, Putin was able to manipulate perceptions and control the narrative to achieve support for the annexation of Crimea and further military actions in the Donbas region of Eastern Ukraine.

Kier Giles, in *Russia's 'New' Tools for Confronting the West: Continuity and Innovation in Moscow's Exercise of Power*, states Russian political leaders were able to set the conditions for their actions through the "purchase of co-opt business and political elites to create loyal or at least compliant networks. Bribes and business opportunities combine with the appeal of a Russian business culture which embraces opacity and corruption to recruit agents of influence throughout target countries."<sup>24</sup> The result, he argues, ensured complicit individuals and businesses were structured and aligned to support Russian narrative and propagate pro-Russian influence throughout Europe. Additionally, Putin's regime used coercion and manipulation of the energy markets to influence and threaten Ukrainian leadership. In the immediate aftermath of the 2014 invasion of Ukraine, Joseph R. Biden Jr. and Michael Carpenter articulate in "How to Stand Up to the Kremlin," that Russia made threats to cut off Ukrainian gas deliveries,

“but thanks to intense diplomacy by the United States and the European Union, Kiev’s neighbors helped avert a crisis by ensuring an adequate supply.”<sup>25</sup> Putin’s operatives also effectively infiltrated Ukrainian computer systems as far back as 2010, targeting government officials and diplomats with a computer malware code known as Snake—malicious software that effectively provided Putin’s regime with access to classified Ukrainian policy and strategy documents.<sup>26</sup> On the ground in Ukraine, Putin covertly employed his special operations forces, backed pro-Russian separatists in the region, and inspired protests to garner local and international support for his agenda and promote chaos and confusion—hallmarks of the Gerasimov Doctrine.

Some argue it was the Kremlin’s long-standing practice of RC and its seamless integration into Putin’s aggressive information operations campaign that contributed most significantly to successes in the region. Timothy L. Thomas, in “Russia’s Reflexive Control Theory and the Military,” defines RC “as a means of conveying to a partner or an opponent specially prepared information to incline him to voluntarily make the predetermined decision desired by the initiator of the action.”<sup>27</sup> Putin was able to effectively manipulate the information framework, saturating Russian-speaking media outlets within former Soviet Union countries with targeted information and disinformation to influence public perception. In a congressional testimony before the Senate Armed Services Committee, Olga Oliker explained the purpose and progression of their narrative as follows:

[T]o convince audiences that EU association would lead to political chaos, widespread homosexuality, and economic collapse. Social media activism amplified these messages, particularly on Russian-language websites. As the crisis unfolded, the coverage denigrated the protesters on Ukraine’s Maidan Nezalezhnosti (Independence Square) who called for the ouster of then-President Yanukovych; the government that took control after

Yanukovich fled; Western governments, which were depicted as orchestrating this “fascist coup;” and eventually the elected government of new President Petro Poroshenko. Social media disseminated both intercepted and apparently doctored recordings of Western officials discussing the situation in Ukraine, with the intent to both embarrass and to suggest a Western hand behind Kyiv’s emerging government.<sup>28</sup>

Despite a massive US military spending budget in 2014 of \$610 billion that dwarfed Russia’s military expenditures and advanced technological capabilities to find, fix, and target an adversary’s military system, United States and NATO allies were unprepared for an unable to effectively counter Russia’s actions in Crimea and Eastern Ukraine. Relatively low cost and ambiguous Hybrid Warfare tactics, techniques, and procedures executed in the Gray Zone essentially set the conditions for Russia to successfully counter the United States and NATO influence in the region and destabilize the Ukrainian government. Their effective operations in Eastern Europe illustrate the challenges associated with Hybrid Warfare and an increasing need for the United States to develop a deeper understanding of the Hybrid Warfare capabilities strategic competitors may employ to gain an advantage and legitimacy.

### *It’s All a Misunderstanding*

Despite the widespread belief that Gerasimov’s article was a clear articulation of Putin’s evolving military strategy and a foundation for Russian Hybrid Warfare tactics as employed in Crimea and Eastern Ukraine, others were quick to assert flaws in that reasoning. Charles K. Bartles in “Getting Gerasimov Right” argues the concepts outlined by the Chief of the General Staff of the Russian Federation Armed Services in “The Value of Science is in the Foresight: The New Challenges Demand Rethinking the Forms and Methods of Carrying out Combat Operations” were meant to be an analysis of the

current operating environment in order to provide foresight for the development of theory and doctrine for future warfare. According to Bartles in “Getting Gerasimov Right,” the indicator lies in Gerasimov’s use of the word *foresight*, which he states in the Russian military lexicon means “the process of cognition regarding possible changes in military affairs, the determination of the perspectives of its future development.”<sup>29</sup> Additionally, Bartles argues that Gerasimov’s discussion of Hybrid Warfare was misunderstood as an analysis of Russian strategy when likely the analysis was of the methods the United States executes against Russia and other competitors in which regime change is the ultimate objective. While the former may be an accurate assessment of the United States’ employment of all instruments of national power to achieve strategic objectives, Russia’s actions in Crimea and Eastern Ukraine are clear examples of Putin employing a calculated fusion of indirect, asymmetric, and non-lethal methods to achieve political and strategic objectives within the Gray Zone.

### *The New Normal*

The United States continues to approve massive defense spending budgets and research, fund, and develop advanced technological weapons systems and capabilities to counter potential adversaries across all domains of warfare—air, land, sea, space, cyberspace, and information. While building and maintaining a powerful conventional force can both prevent conflict and win wars, Mattis and Hoffman state in “Future War: The Rise of Hybrid Wars,” that the United States needs to think beyond traditional conventional systems and allocate the appropriate funding, research and development, procurement, and fielding of capabilities that address the growing number of unconventional adversaries. Instead of challenging the United States head-on in a

technology-by-technology conventional military fight, peer adversaries and strategic competitors such as Russia will increasingly seek alternative methods to destabilize and delegitimize its biggest competitors, namely the United States and its NATO allies, in order to alter the international balance of power in the post Cold War era. Determined to dismantle what it perceives as a unipolar world in which the United States wields unchecked influence and power, Putin has focused his comparatively limited financial resources on developing and employing asymmetric tactics and unconventional methods as a means to gain legitimacy and power in the global arena.

With the concepts espoused within the Gerasimov Doctrine providing the foundation, Putin successfully employed a synergistic fusion of a wide range of Hybrid Warfare tactics—with a heavy emphasis on information warfare—in Crimea and Eastern Ukraine to achieve his strategic objectives. He was willing to manipulate the information environment, use coercion of the energy markets as a weapon, and employ his special operations forces to shape the operative environment and, essentially, operate just below the threshold that would bring strategic competitors such as the United States into a conventional fight. Gerasimov in “The Value of Science is in the Foresight: The New Challenges Demand Rethinking the Forms and Methods of Carrying out Combat Operations” concluded that “no matter what forces the enemy has, no matter how well-developed his forces and means of armed conflict may be, forms and methods for overcoming them can be found. He will always have vulnerabilities, and that means that adequate means of opposing him exist.”<sup>30</sup> The methods most likely to be employed by Russia include an arsenal of Hybrid Warfare tactics that if not studied and challenged, have the potential to destabilize the international balance of power. With its focus on

asymmetric and unconventional tactics employed in the Gray Zone between traditional peace and war paradigms, Hybrid Warfare will likely continue to be the new normal employed by strategic competitors to counter Western democracy rebalance the international order.

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<sup>1</sup> Stockholm International Peace Research Institute, *SIPRI Military Expenditure Database, 1988-2016* (Solna, Sweden, 2017), <https://www.sipri.org/databases/milex>.

<sup>2</sup> Thomas X. Hammes, “The Changing Character of War,” *The Journal of International Security Affairs*, no. 26 (Spring-Summer 2014), <http://www.securityaffairs.org/issues/number-26/changing-character-war>.

<sup>3</sup> US Department of Defense, *Joint Operating Environment 2035: The Joint Force in a Contested and Disordered World* (Washington, DC: Joint Force Development, July 14, 2016), 29, [http://www.dtic.mil/doctrine/concepts/joe/joe\\_2035\\_july16.pdf](http://www.dtic.mil/doctrine/concepts/joe/joe_2035_july16.pdf).

<sup>4</sup> Carl von Clausewitz, *On War*, ed. and trans. by Michael Howard and Peter Paret. (Princeton, NJ: Princeton University Press, 1984): 583.

<sup>5</sup> US Government Accountability Office, *Hybrid Warfare* (Washington, DC: Government Accountability Office, September 10, 2010), PowerPoint Presentation, <https://www.gao.gov/assets/100/97053.pdf>.

<sup>6</sup> Headquarters US Army, *Hybrid Threat*, TC-100 (Washington, DC: Headquarters US Army, November 26, 2010), v.

<sup>7</sup> Frank G. Hoffman, “Hybrid Warfare and Challenges,” *Joint Forces Quarterly*, no. 52 (2009): 35, <http://ndupress.ndu.edu/portals/68/Documents/jfq/jfq-52.pdf>.

<sup>8</sup> Peter Mansoor, “Introduction: Hybrid Warfare in History,” in *Hybrid Warfare: Fighting Complex Opponents from the Ancient World to the Present*, ed. Williamson Murray and Peter Mansoor, 1-17 (New York, NY: Cambridge University Press, 2012): 4.

<sup>9</sup> James Mattis and Frank Hoffman, “Future Warfare: The Rise of Hybrid Wars,” *Proceedings* 131, no. 11 (November 2005): 18, <https://search-proquest-com.lomc.idm.oclc.org/docview/205977465?accountid=14746>.

<sup>10</sup> Safak Oguz, “The New NATO: Prepared for Russian Hybrid Warfare?” *Insight Turkey* 18, no. 4 (Fall 2016): 165-180, EBSCOhost (121157891).

<sup>11</sup> Matt M. Matthews, *We Were Caught Unprepared: The 2006 Hezbollah-Israeli War*. The Long War Series, Occasional Paper, no. 26 (Fort Leavenworth, KS: Combat Studies Institute Press, 2008), 22: <http://usacac.army.mil/CAC2/cgsc/carl/download/csipubs/matthewsOP26.pdf>.

<sup>12</sup> *Ibid.*, 17.

<sup>13</sup> Frank G. Hoffman, *The Contemporary Spectrum of Conflict: Protracted, Gray Zone, Ambiguous, and Hybrid Modes of War*, 2016 Index of US Military Strength (The Heritage Foundation, October 2016), 26, <http://index.heritage.org/military/2016/essays/contemporary-spectrum-of-conflict/>.

<sup>14</sup> US Department of Defense, “DoD Releases Fiscal Year 2018 Budget Proposal,” press release, 2018, [http://comptroller.defense.gov/Portals/45/Documents/defbudget/fy2018/fy2018\\_Press\\_Release.pdf](http://comptroller.defense.gov/Portals/45/Documents/defbudget/fy2018/fy2018_Press_Release.pdf).

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- <sup>15</sup> Mattis and Hoffman, "Future Warfare: The Rise of Hybrid Wars," 131.
- <sup>16</sup> Stockholm International Peace Research Institute, *SIPRI Military Expenditure Database, 1988-2016*.
- <sup>17</sup> US Department of Defense, *The National Defense Strategy of the United States of America* (Washington, DC: 2018): 1, <https://www.defense.gov/Portals/1/Documents/pubs/2018-National-Defense-Strategy-Summary.pdf>.
- <sup>18</sup> Defense Intelligence Agency, *Russia Military Power: Building a Military to Support Great Power Aspirations* (Washington, DC, 2017): 20, <https://www.dia.mil/Military-Power-Publications>.
- <sup>19</sup> North Atlantic Treaty Organization, NATO Capstone Concept, *Hybrid Threats Description and Context*, IMSM-0292-2010, May 31, 2010.
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- <sup>25</sup> Joseph R. Biden Jr. and Michael Carpenter, "How to Stand Up to the Kremlin: Defending Democracy Against its Enemies," *Foreign Affairs* 97, no. 1 (January/February 2017): 51.
- <sup>26</sup> Sam Jones, "Ukraine: Russia's New Art of War," *Financial Times*, August 28, 2014, <https://www.ft.com/content/ea5e82fa-2e0c-11e4-b760-00144feabdc0>.
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<sup>30</sup> Gerasimov, “The Value of Science is in the Foresight: The New Challenges Demand Rethinking the Forms and Methods of Carrying out Combat Operations,” 28.

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