

# 'HYBRID WARFARE': A DRAMATIC EXAMPLE OF CON- CEPTUAL STRETCHING

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## ***Abstract:***

The concept of 'hybrid warfare' has gained and continues to gain traction in Western strategic and military circles over the last decade-plus. However, truth to say, it is still a highly contested concept. This article argues that the main reason for this is that the concept of 'hybrid warfare' has been taken

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out of its original context over time and applied to new cases that lack essential characteristics of the concept. The mismatch that happens when the concept of 'hybrid warfare' does not fit new cases exemplifies what political scientist Giovanni Sartori has called 'conceptual stretching'. Using Sartori's notion of conceptual stretching, this article analyses the conceptual confusion surrounding hybrid warfare and discusses its possible implications for the West's defence policy.

**Keywords: Hybrid Warfare, Conceptual Stretching, Western Defence Policy, NATO, EU**

## *Introduction*

Hybrid warfare is one of the most common terms used to describe present-day warfare. Nevertheless, it is still quite contested. There is no commonly accepted definition of hybrid warfare. Furthermore, the definitions regarding the hybrid model of warfare considerably differ from each other. For this reason, hybrid warfare has been severely criticized by many security experts as being a catch-all concept (see, e.g., Van Puyvelde 2015, Charap 2015, 51; Kofman and Rojansky 2015; Jordan 2017; Caliskan and Cramers 2018, 2).

The primary objective of this article is to analyse why the concept of hybrid warfare is so contested in the way it has so far been conceptualised by international security scholars and practitioners. In addition, this article will briefly discuss possible implications of the lack of conceptual clarity surrounding hybrid warfare for the West's defence policy.

This article argues that the main reason why the explanatory value of the concept of hybrid warfare diminishes is that it has been taken out of its original context over time. Hence, conceptual links between the so-called examples/case studies of 'hybrid warfare' seem quite shaky. The evolution of the concept of hybrid warfare

quite fit Giovanni Sartori's notion of conceptual stretching. Before proceeding to analyse to what extent the concept of hybrid warfare has been stretched, let us take a brief look at the conceptual stretching.

### ***What is Conceptual Stretching?***

The term conceptual stretching first appeared in Sartori's work *Concept Misformation in Comparative Politics* in 1970. According to Sartori (1970, 1034), "the wider the world under investigation, the more we need conceptual tools that are able to travel." That is, Sartori argues that scholars require to apply existing concepts to new cases to make worldwide and cross-area comparisons. Nevertheless, Sartori (1970, 1034) argues, when concepts travel, they usually are stretched. This is because the application of concepts to new cases adds new dimensions to the original meaning of the concept. Sartori named this problem conceptual stretching. For Sartori (1970, 1035), the natural outcome of conceptual stretching is that concepts come to lose some of their precision.

Sartori's notion of conceptual stretching has gained significant traction in social sciences. Synthesising Sartori's ideas, Collier and Mahon (1993, 845) have characterised conceptual stretching as "the distortion that occurs when a concept does not fit the new cases." Carlsson (2017, 148) describes conceptual stretching as "using valuable concepts with clear meaning to refer to inapplicable phenomena." Mitchell (2005, 42) argues that "conceptual stretching results from taking a set of concepts and applying them to new cases when these new cases are not comparable to the original set." According to Marsteintredet and Malamud (2020, 1024), "falling into the trap of conceptual stretching means identifying two different phenomena by the same name."

So far, political scientists have mentioned a wide range of concepts subjected to conceptual stretching including democracy, deliberation, coup, clientelism, globalisation, populism, ideology, and capitalism (see e.g., Collier and Mahon 1993; Hilgers 2011; Regan 2017; Marsteintredet and Malamud 2020; Steiner 2008). This article argues that the evolution of hybrid warfare can be considered as

one of the clear-cut examples of conceptual stretching too. In that sense, the next section will reveal how and in what ways the concept of hybrid warfare has been stretched so far.

### ***Stretching Hybrid Warfare***

Hybrid warfare has been included in the West's strategic lexicon as a battlefield-oriented concept. Generally speaking, the initial proponents of the concept of hybrid warfare have used it to describe a type of warfare that combine regular and irregular military forces.<sup>1</sup> In other words, according to the originators of the concept, hybrid warfare is a form of warfare that is neither purely conventional nor purely irregular. For example, in *British Counterinsurgency in the Post-imperial Era*, Mockaitis (1995, 16) stated that the Indonesian Confrontation "was a hybrid war, combining low intensity conventional engagements with insurgency." Subsequently, in 1998, Robert G. Walker revitalised the term hybrid warfare in his master's thesis titled *SPEC FI: the United States Marine Corps and Special Operations*. According to Walker (1998, 4), "hybrid warfare is that which lies in the interstices between special and conventional warfare." Thereafter, in 2002, the term hybrid warfare reappeared again in William J. Nemeth's master's thesis, *Future War, and Chechnya: A Case for Hybrid Warfare*. In his thesis, Nemeth (2002, 54) argued that "[w]hile not true guerrillas [Chechen fighters] also cannot be accurately classified as a conventional force." In the years that followed, a few scholars such as Dupont (2003, 55), Carayannis (2003, 232) and Simpson (2005) have used the concept of hybrid warfare to refer to a type of warfare that can be classified neither purely regular nor irregular as well. Nevertheless, in the context of hybrid warfare, the academic and practical implications of these authors were relatively limited.

In the existing literature, the term hybrid warfare is often attributed to Frank G. Hoffman. This is because the term itself gained currency after Hoffman published a series

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<sup>1</sup>The terms conventional and regular warfare will be used interchangeably throughout this article.

of papers regarding the topic (see e.g., Hoffman 2007; Hoffman 2009a; Hoffman 2009b). In his seminal monograph, *Conflict in the 21<sup>st</sup> Century: The Rise of Hybrid Wars*, Hoffman (2007, 8) argued that the hybrid model of warfare consists of a combination of four elements: conventional capabilities, irregular tactics, terrorism, and organised crime. Hoffman (2007, 36) argued that Hezbollah's way of warfare employed against Israel Defence Forces during the Second Lebanon War represents a pre-eminent example of the hybrid model of warfare. In addition, Hoffman has also argued that hybrid warfare can be conducted by state actors. In this sense, Hoffman (2007, 28) asserts that "states can shift their conventional units to irregular formations and adopt new tactics, as Iraq's Fedayeen did in 2003." So, the concept of hybrid warfare, as characterised by Hoffman, implies irregular fighters with advanced conventional weapons and state actors who adopt non-traditional tactics.

In one respect, Hoffman's conceptualising of hybrid warfare resembles that of his predecessors. This is because both the aforementioned authors and Hoffman concentrate on a mode of warfare in which regular and irregular forces are of use. As such, the idea of hybrid warfare, as characterised by the originators, mainly entails the employment of overt military. Nevertheless, unlike his predecessors, Hoffman specifically focuses on the blurring of the lines between conventional and irregular warfare in the same battlespace. In the words of Hoffman (2007, 8):

At the strategic level, many wars have had regular and irregular components. However, in most conflicts, these components occurred in different theaters or in distinctly different formations. In Hybrid Wars, these forces become blurred into the same force in the same battlespace.

Subsequently, the concept of hybrid warfare has gained significant traction, particularly in the US military circles. In 2010, the Training Circular of the US Department of the Army (2010, 1-1) codified a hybrid threat as "the diverse and dynamic combination of regular forces, irregular forces, and/or criminal elements all unified to achieve mutually benefitting effects." Likewise, in 2011, the US

Joint Forces Command defined a hybrid threat as "[a]ny adversary that simultaneously and adaptively employs a tailored mix of conventional, irregular, terrorism and criminal means or activities in the operational battle space" (Fleming 2011, 2). Apparently, these definitions reflect Frank Hoffman's understanding of hybrid warfare to a large extent. That is to say, the US military has considered hybrid warfare as a fusion of regular and irregular modes of warfare in the same battlefield.

Although various alternative definitions of hybrid warfare have been produced during this period (see, e.g., Bond 2007; McCuen 2008; Glenn 2009, NATO 2010; Burbridge 2013), until 2014, the concept of hybrid warfare has mostly been understood as a form of warfare in which regular and irregular elements are used in a highly coordinated way. However, the connotations of the concept of hybrid warfare were radically changed after Russian intervention in Ukraine. This is because the Russian activities in Ukraine dubbed hybrid warfare did not quite fit any of the preceding conceptualisations of hybrid warfare.

Briefly speaking, Russia attained its political goals in Ukraine by employing non-conventional means and techniques such as conducting covert operations, using surrogate forces, carrying out cyber-attacks and mounting misinformation campaigns without waging formally declared war. In this respect, the Russian government has consistently denied its active military involvement in Ukraine despite evidence saying otherwise. Accordingly, after Russian intervention in Ukraine, non-kinetic methods and techniques came to the fore in the definitions of hybrid warfare. Moreover, military aspects of hybrid warfare have generally been associated with covert and/or indirect actions.

For example, NATO's (n.d) website currently declares that:

Hybrid threats combine military and non-military as well as covert and overt means, including disinformation, cyber attacks, economic pressure, deployment of irregular armed groups and use of regular forces. Hybrid methods are used to blur the lines between war and

peace, and attempt to sow doubt in the minds of target populations. They aim to destabilise and undermine societies.

Like NATO, the European Union have conceptualised hybrid warfare as a way of achieving political goals by using a fusion of kinetic and non-kinetic tools while remaining below the threshold of formally declared war (European Commission 2016). Clearly, these definitions of hybrid warfare give particular importance to covertness and non-attributable methods and thus consider hybrid attacks as activities remaining below the threshold of war. And admittedly, this conceptualisation of hybrid warfare differs from the previous, battlefield-centric understanding of hybrid warfare.

Furthermore, in the years that followed, Western politicians, authors, and media have continued to apply the concept of hybrid warfare to the new cases. More importantly, although, after 2014, the construct of hybrid warfare is mostly defined as the combination of military and non-military tools, the term has also been used to refer to non-violent disruptive actions. For example, former US Secretary of State Rex Tillerson stated that Russia's alleged meddling 2016 US presidential election is an act of hybrid warfare (EURACTIV 2017). Likewise, the EU has accused Belarus of conducting hybrid warfare by encouraging migrants to cross into Europe through its borders (BBC 2021). A *Der Spiegel* (2016) article has declared that "Putin wages hybrid war on Germany and West," but, indeed, the article was almost entirely about black propaganda and influence operations allegedly conducted by Russia. Labelling these non-violent subversive activities as hybrid warfare obviously represents a significant departure from previous approaches to the hybrid model of warfare. This article argues that this departure represents Sartori's notion of conceptual stretching to a notable extent.

Consequently, as a travelling concept, hybrid warfare has constantly been applied to new cases. Undeniably, the application of the concept of hybrid warfare to the new cases that lack features of the concept has broadened the meaning of hybrid warfare. Currently, the lack of conceptual clarity surrounding the concept reduces its

explanatory power. This could also lead to serious implications for the West's defence planning. Hence, in the next section, we will briefly discuss the potential implications of such poor definitional/conceptual clarity.

### ***Implications for the West's Defence Policy***

As Wither (2016, 74) has underlined, "defining hybrid warfare is not just an academic exercise". This is because, as emphasised in the previous section, Western states currently refer to hybrid threats in their strategy and policy documents. Likewise, Western organisations such as NATO and the European Union use the concept of hybrid warfare to imply contemporary security threats. Hence, the lack of conceptual clarity surrounding hybrid warfare may lead to serious consequences.

The most crucial consequence of this conceptual ambiguity is that states cannot develop an effective strategy to deal with what it deems as 'hybrid threats. Logically, it is not possible to develop an efficient defence strategy against a threat that is not exactly identified in its scope and features.

To provide a better understanding of this situation, it is useful to make an analogy between terrorism and hybrid warfare. Terrorism is undoubtedly one of the greatest security threats to peace. However, it still does not have a universally agreed definition. The lack of consensus on the definition of terrorism creates confusion about which organization should be labelled a terrorist organisation. This obscurity about the definition of terrorism has been considered to be the most fundamental cause of the difficulty faced in the fight against terrorism. The concept of hybrid warfare seems to be suffering the same fate. Alongside the poor understanding of such a phenomenon, the implications of the conceptual ambiguity can be observed both in theory and in practice. In this regard, it would not be an exaggeration to claim that Western states have so far had a poor record in negating hybrid threats when we think of the U.S/Europe with China, the Ukraine/NATO vis-à-vis Russia and the West and allies vis-à-vis ISIS. Therefore, eliminating such a conceptual

haziness should be prioritised by Western policymakers and defence intellectuals.

## **Conclusion**

Hybrid warfare has become a buzzword among Western defence intellectuals and practitioners over the last decade-plus. However, as noted throughout the paper, there is no common definition of hybrid warfare. Moreover, there is even no consensus about the key elements of the hybrid model of warfare. This is because, this article argues, hybrid warfare has constantly been subjected to conceptual stretching.

Initially, hybrid warfare has been incorporated into the West's strategic lexicon as a battlefield-centric concept. Nevertheless, after Russian intervention in Ukraine, the connotations of the concept of hybrid warfare remarkably changed. Since then, the concept has often been described as a way of achieving political goals by using a mix of kinetic and non-kinetic methods while remaining below the threshold of the outright act of war. On top of that, over the last few years, the concept of hybrid warfare has also been used to just refer to non-kinetic destabilising activities. Consequently, the significant differences between examples/case studies have made hybrid warfare a rather vague and ambiguous concept.

Today, Western democracies are facing a wide range of complex security threats. Hence, having clear and well-defined paradigms regarding these threats is of significant importance. Currently, hybrid warfare is one of the most common terms used to describe contemporary threats. However, this usage is not built on a common understanding of what hybrid warfare entails. Although Western states and institutions agree that they need to be prepared against hybrid threats, they conceptualise hybrid warfare in different ways. For this reason, currently, the concept of hybrid warfare obscures the issues rather than clarify them. Hence, eliminating the conceptual vagueness regarding hybrid warfare needs to be prioritised in the West's security agenda.

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