



ALON PAZ

TRANSFORMING
ISRAEL'S
SECURITY
ESTABLISHMENT

POLICY FOCUS 140



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ESTABLISHMENT

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Photo: Female soldiers in the mixed-gender Caracal Battalion train in Southern Israel. (courtesy Israel Defense Forces).

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PREFACE

This monograph represents a milestone in a long journey, one that is still very much unfolding: my sixteen years as available a professional strategist in the Israel Defense Forces. As such, it is part of Israel's quest for peace, security, and tranquility, and reflects the perspective of a military officer in the IDF Planning Directorate at the General Staff.

Over these years, I conducted and took part in countless analyses, major projects, contingency-planning exercises, and strategic assessments. I witnessed the mechanics of military bureaucracy striving to push forward strategic planning and learning processes—while sometimes drifting due to organizational inertia and reluctance to reach tough conclusions. I was part of dozens of discussions about how to shift paradigms, how to adapt, how to innovate.

Like many others in the field, I developed the healthy cynicism often found among experienced civil servants. I am ever fascinated by the constant effort to understand under what conditions and in what circumstances these brave attempts were sound and successful or faint and negligible.

Along the way, I learned to appreciate just how deeply embedded the organizational tendency to compartmentalize is—reducing the holistic nature of war to levels (strategic, operational, tactical) and domains (military, diplomatic, economic, informational). Yet such Weberian compartmentalization can have the net result of actually undermining strategy. Instead of creating conditions for a marriage of ends, ways, and means—the aim of good strategy—it causes their divorce. Security establishments are characteristically divided into segments that fail time and again to integrate—sometimes knowingly—with the consequence that many of their strategies are wholes that are smaller than their parts.

The immediate purpose of this monograph is to suggest a broad analysis of the strategic problem faced by the Israeli security apparatus, in general, and

the IDF, in particular, while grappling with the astonishing ways in which war is changing. This monograph proposes an alternative strategic vision and a certain path to achieve that necessary transformation. Although as an active-duty officer I am unable to detail the specifics, these pages provide a theoretical framework for concrete transformation.

From a broader perspective, the impetus for this paper came from my view that Israel's military experience is a manifestation of a more general Western problem: the asymmetry between our one- or two-generation-old networked rivals and the often dinosaur-like legacy traditions of our state-based militaries.

I hope that readers will find the monograph useful in the enormous effort of fitting security systems to future challenges and, further, that it will be a starting point for discussion and cooperation regarding military transformation.

Like other officers, I was fortunate to enjoy several opportunities to generalize my experience and to deepen my understanding of strategy through military courses and academic research. However, unlike most of my peers, I was afforded a unique opportunity to deepen my insights into the field of strategy through a yearlong research fellowship at The Washington Institute in 2014. That year enabled me to overcome the limitations inherent in solo efforts and empowered me as a potential agent of change in the Israeli security apparatus and the IDF. The vast majority of the manuscript was written during that time as a visiting military fellow. Since then, regional developments only enhance the ideas I try to articulate in this paper.

I'm indebted to my visionary commanders at the IDF—some with a long history of cooperation with the Institute—for recognizing the great opportunity afforded me and giving their support and blessing. In addition, the entire Defense Attaché staff in Washington welcomed my family to town and was most helpful throughout the year.

A special word of thanks is due to Harvard professor Steve Rosen and RAND Corporation fellow Dr. David Johnson, who voluntarily became my tutors during the year. They each commented on various versions of the manuscript and contributed many insights along the way. Michael Eisenstadt, director of the Military and Security Studies Program at the Institute, guided me through the strategy, tactics, and mechanics of the think tank community. Publications director Mary Kalbach Horan and editor Jason Warshof shepherded this manuscript into its final form.

Institute interns Ari Cicurel, Rachel Schwartz, and Eliyahu Kamisher were instrumental in helping me put my Hebrew thoughts into English words; I am grateful to them for their energy, enthusiasm, and passion.

Funding for my research was provided by the Baye Foundation, Inc.; the Rosalind and Arthur Gilbert Foundation; the Gold Family Foundation; and the Maimonides Fund; this study would have been impossible without this generous support.

Finally, I am grateful to Rob Satloff, whose indispensable vision has created a warm home for visiting military fellows of the IDF at The Washington Institute. My thanks go to the entire Institute staff.

I dedicate this monograph to my family—my wife, Sigal, and my daughters, Carmel, Tavor, and Arbel. They are my real end, ways, and means.

ALON PAZ

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EXECUTIVE SUMMARY

The regional and international security scene has recently been marked by dramatic political and military changes, raising questions about the effectiveness of Israel's existing security paradigm. Focused primarily on conventional state-centered military conflicts, the security paradigm must now take into account new threats and opportunities engendered by urbanization, radicalization, water and food insecurity, global connectivity, and power diffusion.

In this changed landscape, armed nonstate actors, sometimes backed by antagonistic states, have effectively challenged Israel's national security doctrine. They employ advanced military and nonmilitary means to promote their political goals and undermine Israel.

This drift has manifested itself within the Israel Defense Forces in two primary ways:

- **DIMINISHED EFFECTIVENESS.** Over the past generation, considerable investment has been made in the doctrine and armament of the IDF to improve its effectiveness over Israel's adversaries. Nevertheless, the indecisive results of four military engagements in the past eight years show that the Israeli security establishment¹ as a whole is becoming less effective in achieving its national security goals. This is compounded by ill-defined goals that are increasingly vague and less thoroughly discussed.
- **ERODING MILITARY SUPERIORITY.** Despite tactical and sometimes even operational investments, Israeli superiority is eroding because of the proliferation of advanced military capabilities among state and nonstate actors confronting Israel. Additionally, most of Israel's adversaries have adapted in ways that allow them to avoid contending with the IDF's strengths. This challenge is exacerbated by increasing domestic and external constraints on the IDF's use of force. Consequently, Israel's freedom of action and its range of usable military options are narrowing. The

IDF's expectation of tactical overmatch against its potential adversaries has thus shifted to a situation in which an enemy's asymmetric capabilities often make it a "near peer" in several areas, mostly based on standoff weapons and propaganda warfare.

Yet the gap between these emerging threats, and the existing tools to cope with them, extends beyond the traditional military arena to the national security doctrine and the establishment responsible for implementing it. The following are the main hurdles:

- **DOCTRINAL QUAGMIRE.** Israeli strategic thinking is still mired in military strength-vs.-strength concepts in a stable-state-actor environment, even when confronted with strength-vs.-weakness situations within today's long-term, multidimensional competitions in a morphing landscape populated by hollow states and different types of armed and unarmed nonstate actors. The relevance and applicability of military-focused "deterrence, early warning, and military overmatch" are diminishing, whereas homeland security requires ever-increasing investment. Complex regional threats, nested within regional and global networks, also impose growing challenges on early-warning capabilities. On this count, traditional military deterrence does not suffice vis-à-vis armed nonstate actors, and rapid, clear-cut military overmatch will be unlikely means for defeating adversaries. As already noted, war outcomes have become increasingly ambiguous and indecisive. Thus, establishing clear goals constitutes a more complex task entailing a range of considerations, including navigating heightened political constraints. Additionally, existing threat-based doctrine limits Israel's capability to identify and exploit emerging opportunities. Israeli thinking is thus reactive, lacking the long-term strategic mindset necessary to implement an actionable vision for the future.
- **STOVEPIPED SECURITY ESTABLISHMENT.** The IDF plays an outside role relative to civilian organizations in the security realm. An overemphasis on military capabilities results in significant gaps when addressing nonmilitary threats or exploiting nonmilitary lines of effort such as diplomacy, information, economy, law, and the home front. Furthermore, Israel's preferred military-centric approach exacerbates existing imbalances in these areas. And Israel's stovepiped security establishment is slow to learn, adapt, and implement plans when facing today's evol-

ing, networked threat. More than ever, strategic competence, not tactical superiority, is the key to successfully coping with the emerging threats to the security environment.

The chameleon that is war has changed its colors again, and the Israeli security apparatus must likewise transform its guise to gain strategic competence in all arenas. This includes developing as many national security tools as possible; defining national security problems at the highest possible level; setting appropriate ends, ways, and means accordingly; and shaping and stabilizing a fragile surrounding area. All this must happen while forming innovative partnerships and competing with adversaries over the long haul. This paper argues that Israel must rebalance its national security establishment and improve its effectiveness along six lines of effort: military, diplomacy, information, economy, law, and the home front.

Israel's new security environment necessitates new concepts to understand it. Professionals must enrich and expand the traditional paradigm of "deterrence—early warning—decision—defense" with suitable concepts such as limited conflict, competitive strategy, shaping strategy, nonmilitary lines of effort, and the like.

In the military sphere, IDF leadership should strengthen its operational design capabilities through organizational processes and tailored training and education. Likewise, the military culture of "what can be done" should be broadened to accommodate a culture of "what should we learn and how best should we learn it." The IDF General Staff must correspondingly rebalance its investments in institutionalization, adaptation, and anticipation, and foster an ethos of organizational transformability. The IDF must also develop its cooperative skills and invest in developing its ability to partner in coalitions.

Intelligence remains crucial to the effectiveness of all security outputs, and the overall hunger for information is ever growing. Israeli intelligence agencies must network and integrate their assets, sensors, and databases to support every line of effort. The intelligence community must also develop new and unorthodox methods to deal with today's "ecology of warning," much of which is nested in the private sphere.

And eventually, education must be revolutionized in order to better prepare officials in the IDF and other Israeli security agencies for the art and science of today's and tomorrow's wars. In order to have sustainable strategic competence, the IDF must address planning as a profession, and the entire security establishment must give planners an improved professional education

that will train them in the realm of strategic thinking. At the same time, the IDF should improve its collaborative engagement with nonmilitary peers as well as with its political masters.

Current shortfalls in Israel's ability to identify and understand emerging challenges hamper its ability to either fend off threats or exploit opportunities; they leave the country's security establishment in need of innovative responses and a broad transformation. Although the scope of the requisite change may seem overwhelming, previous experiences of both successful and failed transformations in militaries and security establishments suggest that several leading principles can guide an Israeli effort—if the right leadership is in place and if the reform process is determinedly and systematically pursued over time.

Among these principles: a visionary theory of victory, enabling technologies, the existence of unmet external military challenges, an effective combination of technology and operational concept of implementation, a challenge to the relevance of a subunit's mission, a receptive organizational climate, support from the top, broad organizational involvement in exploration, mechanisms for experimenting with new concepts, and an effective mechanism to encourage compliance and prevent shirking.

This challenge to transform the security paradigm echoes through literature and history. In Homeric terms, the art and science of strategy involved a constant balancing of *bie* and *metis*—brute force and guile—in response to ever-changing circumstances.² The story of the Trojan horse exemplifies this well, and in the Old Testament, the narratives of the heroes David and Gideon illustrate the superiority of guile, or cunning, in defeating one's adversaries against all odds. And so the time has come for Israel to move from outweighing its adversaries to outsmarting them.

CONSIDERING THE ALTERED SECURITY LANDSCAPE

ISRAEL was established in an era when the dominant regional trend involved the turbulent two-decade-long emergence of strong military states out of weak societies. Israel's leaders recognized the benefits of operating in a hostile environment dominated by authoritarian states, a situation that was at least somewhat predictable in comparison to today. In that earlier context, Israel's interest was in preserving regional stability, while improving its own military, political, and economic position. Today, however, power is diffused and distributed, with many nation-state structures crumbling. Vast tracts of territory are being filled with violent subnational and supranational actors, competing over territory, resources, and narratives, while redefining national borders. At the same time, state power still plays a key role in the region, and states' military forces continue to be a factor in the Israeli security calculation.

At the international level, a new reality is emerging. Whereas during the Cold War the Middle East figured into the confrontation between the two superpowers, and afterward into the reality of a single superpower, the future Middle East will be part of a complex, multipolar global competition among the United States, Russia, China, and possibly India. This means the region—on the ground, in the air, and at sea—will get even more “crowded.” Yet even as parties compete for regional dominance, nothing is purely regional in today's reality; everything is global. Amid this blend of traditional and emerging rivalries, previously unthinkable types of cooperation are emerging.

The region will continue to be characterized by conflict and competition, fueled by material needs, symbolic and moral or ideological forces, and traditional national interests. This is partly a result of a diminished U.S. regional role, creating space for other actors to pursue their own regional policies. Although Israel is affected by these complex unfolding dynamics, it lacks a nuanced picture of the forces, logic, and motives behind actors' behaviors and

policies in the region. This type of situational awareness is necessary to efficiently leverage Israel's regional stature and national instruments of power. What is certain is that none of these tiers of regional competition can be successfully addressed by merely military means.

NEW SECURITY CHALLENGES

In the past, the major regional military threat to Israel was a potential conflict with Arab state military coalitions. After successive wars following this pattern, and thanks to the success of Israel's doctrine of mobile decisive warfare, this threat disappeared long before a civil war ravaged Syria's army. In fact, regime military threats to Israel's national security from countries such as Egypt, Syria, or Iraq are today lower than ever before. Some such countries are allies, or at least share interests with Israel, and play by the "old rules" of the state system. Other actors, meanwhile, such as Salafi-jihadist groups and members of the Shiite axis, are striving to transform the current regional balance of power in general and the state system in particular.

In the coming decade, hybrid entities and networks of subnational and transnational actors will pose ever greater threats to Israeli national security in the context of a chronically unstable region. At the military-strategic level, adversaries employing asymmetric warfare have the ways and means to bypass Israel's previously effective military shield. Thus, Israel and the region will face fewer interstate wars, and more intrastate and unconventional conflicts, to the extent that conventional warfare can no longer be the main basis for military strategies and force structure.

Furthermore, the limited asymmetric or unconventional threats Israel now faces are structurally different and pose more complex conditions than conventional, existential threats (see Table 1). Confronted with an existential threat, the government has no serious problem defining its political goal, which is invariably a reactive one directed at negating the opponent's objectives mainly through defeat of its military forces. Nor will the government seriously struggle to mobilize the necessary political will and domestic support to address these threats. Indeed, the government's main problem in past state conflicts involved output and capacity: how to allocate maximum military means and manpower in the shortest possible time in order to rapidly succeed based on a generic pattern of military deployment. Time and scarcity of means were thus the main constraints shaping strategic planning.³

By contrast, limited, asymmetric, and hybrid security challenges in today's

transforming Middle East pose a different set of problems. Merely negating opponents' objectives no longer reflects a sufficient definition of national security goals, and the Israeli government needs to clarify the political objectives of any intervention—and, if possible, in *positive*, constructive terms. At present, the military fights wars with ill-defined political objectives, hampering its ability to effectively harmonize military objectives with ways and means. In the case of limited war, a challenge involves generating necessary political will, given that the public may not fully understand the nature and logic of the threat, military plan, and political goals. The government itself is constrained by the corresponding desire to call for the minimum necessary military mobilization due to lack of consensus and political will.

TABLE 1: FACING DIFFERENT THREATS

| | Existential / Conventional | Nonexistentia / Unconventional |
|--------------|---|---|
| ENDS | Negative definition ("destroy," "deter") | Positive definition ("build," "shape") |
| WAYS | Generic pattern | Unique adaptive design |
| MEANS | Maximum possible | Optimum/minimum necessary |

Additionally, in contrast to earlier times—when Israel could escalate militarily to resolve protracted security challenges by conventional means—current and future limited challenges demand that the government, together with the professional echelons across the security establishment, tailor new types of responses to address unique threats and opportunities, while also working to precisely allocate, or create, the correct amount of national sources of power needed to deal with a given problem. Often, the particular goals, logic, and forms of responses to contemporary threats only become clear as the threats themselves emerge. The new security environment complicates planning, decisionmaking, and execution, and creates a reality in which non-military considerations not only affect every aspect of war (as they always did) but even overshadow military factors.

War has not only become increasingly asymmetrical militarily, it has also bled into nearly every sphere of human activity. The traditional boundaries between war, peace, counterinsurgency, crime, law enforcement, unconventional and conventional, kinetic and nonkinetic are blurring along with the

conceptual dichotomy between these concepts. Even national security espionage is blending with industrial espionage. Actors are engaging in more than one type of competition and conflict at the same time, using violent and non-violent instruments. The consistent decline in interstate conventional wars has not, as one might expect, boosted conventional peace. Seemingly, the more states prepare for conventional wars, the more they are involved in unconventional conflicts. Militaries, thus, are increasingly involved in operations other than war as part of conflict management or need to operate in a complex environment composed of friendly, hostile, and neutral elements while being observed by onlookers worldwide, thanks to globalized media. Nonmilitary means are being used in dissuasion and coercion efforts as part of protracted conflicts. In this reality, the traditional paradigm of conventional interstate warfare cannot realistically serve as the only organizing concept for both the design and the use of military force.

Given Israel's increasing integration into the international order, it more than ever before limits its actions and considers external factors before and during conflicts.⁴ Being part of the international fabric is an essential national security interest for Israel. Nevertheless, the country's level of interdependence with states and international entities is unprecedented. Therefore, informational, diplomatic, and legal "lines of operation," which are increasingly essential to Israel's international standing, no longer play a secondary role. Furthermore, many of the threats Israel faces cannot be addressed unilaterally, thus making international partnerships crucial. Hence, the more Israel depends on external support to achieve its military objectives and political ends in conflicts, the more external constraints will be considered in determining outcomes.

DECISIVE VS. LIMITED WARS

Israel's enemies have also changed their "doctrine." None of Israel's adversaries want a large-scale conventional war with Israel, given its superiority in traditional warfare domains and its overwhelming firepower advantage. Unlike the IDF—and other Western militaries—which tends to mold its thinking and doctrine to fit existing military technology, four engines shape the doctrinal progress of Israel's rivals: (1) a solid revolutionary and political vision regarding their desired future end state; (2) superior political capability; (3) technological inferiority, which forces them to offset the Israeli military capability by dividing the Israeli public, undermining its self-confidence

and morale, and eroding its political posture both domestically (in terms of public support for the government and the security establishment) and internationally (in the legitimacy of Israel's ends, ways, and means);⁵ and (4) a loose network of shared tactical experience. Israel's networked rivals have developed doctrines and capabilities and some combination of real and perceived invulnerability that allows them to avoid decisive military defeat and threaten high levels of Israeli civilian and military casualties. In doing so, they aim to exploit two core Israeli operational vulnerabilities—its sensitivity to casualties and the vulnerability of the home front—when the IDF operates conventionally in order to ultimately wage lawfare against Israel. Indeed, while Israel fights wars primarily with military means, its adversaries fight wars with all available means.

In several military successes between 1948 and 1982, Israel demonstrated effective deterrence in conventional wars against regional states. This type of war can still occur, but the more likely model will involve a new type of adversary seeking to offset Western technological superiority through confrontation other than direct military engagement, the creation of advantageous asymmetries, and the exploitation of local terrain as well as Western vulnerabilities and self-imposed restrictions.⁶ This is another turn in military history, wherein the underdeveloped “small and many” seems to have found an answer for the more advanced “big and few.”⁷ This answer is protracting the war to erode the stronger party's will to fight.

In addition to their doctrinal sophistication, hybrid adversaries have progressed technologically. They have newfound access to advanced, state-built weapons, especially man-portable air-defense systems (MANPADS), anti-tank missiles, antiship missiles, short- and medium-range ballistic missiles, drones, rockets, and mortars. And they are on a path to acquiring precision capabilities that will allow greater lethality and dramatically expanded reach. This proliferation of advanced standoff weapons systems erodes the tactical edge traditionally maintained by state-based militaries.⁸ Another important trend is the gradual improvement in intelligence, surveillance, and reconnaissance (ISR) and command-and-control capabilities, as well as cyber capabilities already effective for psychological warfare and information operations⁹ and perhaps in other areas as well.

As a result, Israel's hybrid adversaries have managed to develop a relatively effective strategy to neutralize Israeli air- and ground-maneuver capabilities and to overshadow its underdeveloped political capabilities. Having disappeared from the traditional battleground, they now blend into the civilian

population, go underground, employ antiaccess and area-denial strategies, use standoff capabilities, and apply delicate brinkmanship and even coercion by employing both military and nonmilitary means to attain moral and material outcomes. Above all, they can refuse a confrontation on Israel's terms and avoid directly confronting IDF military strength as desired, or they can challenge Israel in the fundamentally asymmetric game of hide-and-seek, in which it is much easier and more cost-effective to hide than seek. For Israel, the price of seeking is extraordinarily high in terms of intelligence needed, targeting and precision capabilities, as well as potential soldier and civilian casualties and collateral damage. Israel is thus left with limited and problematic alternatives: (1) take no action and harm deterrence, (2) engage in large-scale, decisive military responses with the risk of counterproductive consequences, or (3) conduct limited operations. The third option is not a matter of scale but of type. Further, since Israel's overarching paradigm is anchored in decisive warfare, it lacks the operational competence to plan, execute, and leverage an effective limited-conflict strategy and measure its success.¹⁰ Thus, the enemy has taken the war to arenas where it enjoys a competitive advantage over Israel. Having moved away from the traditional battlefield, it has dispersed to every realm of human confrontation and interaction.¹¹

OUTDATED FOCUS ON CONVENTIONAL MILITARY

The Clausewitzian concept whereby the balance of power within the “remarkable trinity” of the people, the government, and the military can together produce victory in war has been altered by social, economic, and cultural changes globally. The delicate Israeli—and essentially Western—equilibrium of this trinity has shifted toward the people, giving them more influence than ever before over both the state and the military. This balance has made mobilizing and justifying Israeli military action domestically and internationally more difficult and more costly, both in material and political terms. Furthermore, today in Israel, threats are no longer perceived to be as existential as they once were. By comparison, the existential nature of past interstate wars provided a strong justification for action and mobilization.

Military history suggests that the weak side will have an easier time transforming and creating operational advantages, whereas the strong side tends to stagnate.¹² The Israeli case is no exception. Israel's security apparatus still tends to think tactically and act militarily, rather than thinking strategi-

cally and acting multidimensionally. Israel is late to recognize the emerging trends¹³ and to understand that relying almost exclusively on military means is insufficient because of adaptations made by its adversaries to mitigate their relative military inferiority. Further, the current situation is characterized by an unclear blend of conflict, competition, and cooperation. Indeed, military operations requiring a clear “enemy” to target are less effective amid such blurred rivalries.

In the past, war was about *concentration*—the massing in space and time of armed forces on the battlefield. Today, and increasingly into the future, the regional security landscape and the nature of conflicts are changed, with strong and capable networked enemies waging new forms of multidimensional war. These enemies use military and nonmilitary means not only in the traditional battlefield but also dispersed in *time, space, and throughout nonmilitary domains*. Notwithstanding this shift in the very character of warfare, the Israeli security establishment is still predominantly focused on conventional military concentration on the battlefield.

Given the rise of asymmetric threats, this study argues that the Israeli security establishment must shift from its longstanding focus on military concentration to developing a strategic multidimensional competence aimed at meeting a broad range of security threats. Unfortunately, in the current system, tactical proficiency, which can be assessed by traditional measures, almost always trumps strategic competence, which, as noted, is much more difficult to measure and assess.

ISRAEL'S SECURITY ENVIRONMENT: UNDERLYING TRENDS

TRENDS beyond the adaptability of Israel's foes are transforming Israel's security environment, from demographic developments to social networks to energy developments.

URBANIZATION, MIGRATION, AND ECONOMIC STAGNATION

By 2030, more than 65 percent of the world's population will live in cities, two billion of them in the urban slums of the Middle East, Africa, and Asia. Massive rural-urban migration, mostly to littoral zones,¹⁴ has already vastly altered the setting and context of Israel's wars.¹⁵ Currently, 80 percent of the global population lives within sixty miles of the sea, and the great majority of future migration and population growth will be centered in these coastal zones.¹⁶ These densely populated and highly complex littoral zones are increasingly prone to political instability, conflict, and disease, helping explain the region's existing gradual replacement of the state order by local violent actors and the emergence of the "feral" adversary.¹⁷ Combat in this environment is increasingly constrained by an ever-growing media presence and the potential for civilian casualties. Moreover, large concentrated populations will be more and more able to influence governments and trigger political movements. Operations within these littoral, networked urban settings have already become unavoidable and represent the new "conventional" environment of war. Militaries, as well as other national instruments, must adapt to urban combat. Israel, itself a littoral state, will continue to face the challenge of protecting its coastal urban clusters and onshore and offshore strategic assets from multiple threats. Challenges to Israel on this count are both geographically closer and farther, from cities on the Mediterranean to urban areas from Bandar Abbas, in Iran, to Port Sudan.

Economically, Middle East exports constitute less than 4 percent of the global market, and the region's economies are fractured and disconnected from one another.¹⁸ With the onset of the Arab uprisings and continued instability, these problems are prone to metastasize. Arab governments, if they exist, are weak and lack the necessary political support and capacity to implement vital economic reforms and encourage employment, with massive youth unemployment exacerbating rampant radicalization.¹⁹ Climate change and the potential for epidemics could further worsen the region's economic and demographic crisis. Together, these conditions pose a direct threat to future Israeli national security that cannot be ignored.

NETWORKED CONNECTEDNESS

People are now connected through highly networked, integrated licit and illicit means, allowing them to take advantage of the global flow of information, ideas, capital, goods, and people. Commodities and narratives no longer spread through state-controlled networks but through vast decentralized channels. Globalization provides an open space for the competition of narratives—from peaceful and constructive to violent and nihilistic—on an uncensored playing field. Despite chronic conflict, the Middle East is experiencing the fruits of globalization, with satellite dishes and cell phones permeating the region. Further, of all the world's regions, the Middle East and Africa have seen the highest recent growth in Internet usage, with this growth projected to continue.²⁰ While globalization creates economic interdependencies and fosters exchange between disparate cultures, related technology and networks can be used by extremists to engender friction, conflict, and chaos. It is no wonder one sees extremist actors throughout the Middle East using globalized networks to disseminate radical ideologies; mobilize jihadists;²¹ transfer weapons, drugs, and finances; share technical expertise; and wage psychological warfare. Given that connectedness is fundamentally altering Israel's strategic operating environment, understanding and adapting to these global networks will be of vital strategic importance.

ENERGY TRENDS

Whereas world energy demand is projected to rise sharply in the coming decades, the supply side of the equation is unclear. The competition between existing and new sources of energy will continue to have an impact on global

and regional stability. Both high and low oil prices have the potential to increase instability in the Middle East.

Additionally, the nature of future U.S. involvement in energy-related trends in the Middle East is unclear because of its decreasing dependence on the region's oil and increasing role as an energy provider. In fact, this development is already shifting perceptions and policies of regional countries both allied with and hostile to the United States—with these countries continuing to channel revenues toward weapons procurement—as well as of global powers seeking influence and presence in the region.

Lastly, offshore energy discoveries in Israel's maritime exclusive economic zone, including the Tamar and Leviathan gas fields, are already significantly altering Israel's energy security and its geostrategic posture. Yet the path toward independence is replete with challenges and necessitates adapted diplomatic, economic, security, strategic, legislative, and regulatory policies that the country is not yet equipped to implement.

ISRAEL'S SECURITY LANDSCAPE: TRADITIONAL VS. TRANSFORMED

SINCE its establishment, and particularly during the last few decades, Israel has maintained a defensive national security strategy focused on preserving the state by either military deterrence or a decisive use of the military instrument in the face of dramatic external changes or war. During this time, the security apparatus has been adapted, but never transformed, nor has Israel fundamentally changed the way it builds its military capabilities and thinks about security problems. In its early years, the IDF consciously developed an operational concept to defeat regular armies by combining decisive-maneuver warfare and operational deception. As enemies changed to networked and armed nonstate actors (e.g., Hezbollah and Hamas), the IDF unconsciously “calcified” its orthodoxy. It gave up its emphasis on innovative offensive maneuver and deception. Instead, it adopted a defensive mode of action and developed a highly efficient “targeting machine” to complement a strategy of denial and attrition, mainly through overwhelming firepower, mostly from the air. This was based on an assumption that technology can solve every problem. But the overemphasis on the technological dimension of war resulted in the IDF paying too little attention to war’s social and political nature and stifled creativity in these realms. The upshot has been that Israel has engaged in expensive wars of attrition that—despite its economic success both in relative and absolute terms—it cannot afford.²²

The endurance of these traditional paradigms amid change reflects the continued focus, by the very powerful Israeli security establishment, on tactical military thinking and excellence in tactical execution. This is combined with deep organizational inertia held over from the era of industrialized and bureaucratized war, when the operative notion was that superior military capabilities meant clear-cut victory.²³ Tactical military successes over the years reinforced this notion and contributed to paradigmatic stagnation and resistance to transformational change.²⁴

Nevertheless, the region, left to its own devices, will produce greater instability at the expense of traditional “status quo” states such as Israel. For the foreseeable future, in a Middle East characterized by disruptive change, there is little status quo to preserve. Israel can no longer lean on the previous comfortable and stable regional reality and develop strategies with the hope of maintaining it. Despite the consistent defensive effort of recent years to prevent enemy infiltration by building technological and physical barriers, as well as the conceptual notion of Israel as an island in the storm, this strategy, while mitigating the effects of regional instability and terrorism against Israel, has not lessened the long-term security challenges.

From an organizational perspective, the IDF is by far the most influential body in Israel’s security decisionmaking process. Additionally, most positions in the broader security apparatus are filled by former military officers. From a cultural perspective, the tactics-oriented approach of the IDF pervades the security apparatus, helping explain the tendency to exclude nonmilitary matters from Israel’s strategic thinking. Likewise, from a bureaucratic perspective, the National Security Council, Ministry of Foreign Affairs, and other branches are still relatively weak and lack the skills to effectively participate in the security discourse. Other than the military, then, almost no organization provides influential analysis and expert opinion to political decisionmakers. As a result, intelligence and planning efforts are focused almost exclusively on the adversary’s military capabilities. The Israeli security bureaucracy and decisionmaking processes, correspondingly, marginalize the nonmilitary aspects of planning, preparation, and execution, focusing instead on military intelligence briefings and designing contingency plans for political approval. The political decisionmaking process is almost completely driven by these military inputs.

AN ALTERNATIVE AND DESIRED REALITY

The chameleon that is war has changed its colors again, and the Israeli security apparatus must transform to match its new guise. Since war has spread to new nonmilitary realms, the institutional approach toward it must be revolutionized. In focusing on a way of battle, Israel has sought to win military engagements that result in some amount of destruction of enemy forces. But because today’s engagements are multidimensional and protracted, Israel must adopt a way of war that reflects this transformation.

Organizations are designed to employ a certain strategy, implying a

strong coupling between the two. One major practical implication of this observation is that strategy is organizationally contingent, and separating an organization's formative aspects from the substantive aspects of its strategy is impossible. If one desires to utterly transform the national strategy, then inevitably the establishment to implement the new strategy must itself be transformed.

The literature examining military transformation does not settle on one generic formula for success. Nevertheless, it does show that ignoring certain general principles will ensure failure. The following section thus offers principles for Israel to consider, arranged in three areas: the scope of transformation needed, a suggested organizational process to promote change, and concrete issues that must be addressed to ensure the transformation occurs.

REIMAGINING ISRAEL'S REGIONAL ROLE AND SECURITY ESTABLISHMENT

It is important to acknowledge the existence of two deeply rooted schools of thought in Israeli strategic thinking: the “iron wall” and the “outstretched hand.” Adherents of the former, perceiving security reality as a constant war of existence in a tough neighborhood, espouse two fundamental priorities: Israeli independence and resilience. Their objective is to seal off Israel from threats, letting them shatter against the wall, and expand the window between inevitable conflicts. In contrast, the outstretched hand camp strives to make Israel part of a greater regional bloc to preempt shocks and minimize their impact, ease the burden of limited resources, and better contain threats or keep them as distant as possible from Israeli borders and society.

The vision outlined here rebalances these two approaches by moving more toward the outstretched hand school, and suggesting three basic components for Israel's ultimate national security goal: (1) increasing Israel's resilience to geostrategic shocks; (2) partnering with others to shape the regional political environment in ways that decrease the potential for such shocks; and (3) creating conditions for Israeli society to rebound when shocks occur. However one regards the validity of the following regional vision, a more balanced security establishment is needed for Israel to succeed in the future.

The first step in addressing the widening gap between Israel's current security structure and the changing regional security situation is to develop a conceptual framework, or map, of regional realities that outlines and analyzes future national security goals and challenges.

A POTENTIAL BLOC OF REGIONAL STABILITY

Even as the Middle East appears ever more turbulent, a creative Israeli security establishment can take advantage of an opportunity centered in its own territory to create a stable regional bloc. Surveying the situation in Israel's various directions can help explain this premise.

TO THE NORTH. Along Israel's northern border stretches the Feral Crescent,²⁵ from Lebanon via Syria to Iraq. This region is characterized by weak national identity, a lack of state governance, and porous political borders that allow transit for materials, people, and ideologies. This space will continue to be filled by local actors who will impose varying methods of order and governance. The region, moreover, is characterized by supranational identities, sectarian polarization, a Sunni-Shiite divide including a proxy war for influence inflamed by a presumably nuclearizing Iran and radicalized Sunni actors, and an increasing presence of foreign states and nonstate actors, often armed ones.²⁶ As a bordering country, Israel will have to be proactive—preferably by contributing to a multilateral stabilization and deradicalization effort and to humanitarian relief efforts. At the same time, Israel will need to continue staving off military threats from its borders both unilaterally and multilaterally, with the help of a Western coalition. Additionally, Israel will have to work actively to contain both Iran's nuclear program and its hegemonic designs in the region. Here, Israel must develop a hedging strategy to balance unilateral with coalition efforts—with or without U.S. leadership. Overall, such steps demand a new and forward-looking strategy for regional stability.

AT THE CENTER. From a geostrategic perspective, the center of Israel, together with Jordan and the West Bank, has the potential to function as the stable core of the Middle East. The area's location along the Mediterranean, together with the maritime exclusive economic zone,²⁷ creates a littoral bloc that stretches from Cyprus to Jordan. Given offshore energy discoveries and Israeli desalination capabilities, the area could well grow as a center of the region's water, food, and energy security and as the only secure ground-transport bridge from the Mediterranean to the Gulf Cooperation Council countries. Not only is fostering such a positive future in the interests of regional countries, it also coincides with the interests of international actors such as the United States, China, and the European Union. Israel clearly plays a key role in this bloc and enjoys major influence within

it. As such, Israel has the power to help decide—and shape—the role the West Bank will play in this bloc. Doing so will require overcoming complex ideological, political, security, social, and economic challenges. The more the West Bank can be *integrated* within the bloc, the greater the bloc's potential to be consolidated—to the benefit of its members.

TO THE SOUTH AND SOUTHWEST. Israel shares with Egypt and others the challenge of pacifying and stabilizing the Gaza Strip and Sinai. To achieve this, Israel needs to cooperate closely with Egypt and third parties from within and outside the region and to develop a comprehensive strategy to ensure demilitarization and prevent rearmament, while at the same time promoting deradicalization and rehabilitation. Given the geopolitical linkages connecting the Gaza Strip with the West Bank and Egypt, and the relations between Israel and Egypt, Israel can influence the role of the Gaza Strip and Egypt in the littoral bloc. It also retains leverage over the extent to which Gaza and the West Bank will function as a single political entity or remain separated.

The vision just articulated will compete with other visions of the future regional order. Iran and its regional allies have their own vision for the Middle East, as do Salafi Sunni movements and violent extremist organizations. Furthermore, a greater Israeli role in the shaping of efforts will increase the chances for more friction and setbacks with both the Iranian and Salafi camps. Therefore, it is necessary to describe the nature, characteristics, and forms of threats to this vision as well as, preliminarily, the sorts of responses such threats will require. Given the scope of this monograph, only the context, logic, and contours of these threats and the types of possibly resulting wars will be illustrated. Clearly, in-depth exploration of future wars is still needed.

Israel is actively involved in four different protracted conflicts—or, better, competitions—that manifest the collision of various visions for the region: (1) pacifying the Gaza Strip; (2) responding to Sunni jihadists threatening the country from Syria, Sinai, Lebanon, and Jordan; (3) rolling back the Iranian threat network in the Levant; and (4) rolling back Iran's nuclear capability. All four present unique challenges and entail varied combinations of nonviolent, as well as conventional and unconventional military, measures. Each can escalate independently, or they can morph into multifront conflicts. Some will be further complicated by the potential for concurrent major humanitarian crises, especially in Gaza, Syria, or Lebanon.

A MORE INCLUSIVE, FLEXIBLE SECURITY ESTABLISHMENT

As war expands to nonmilitary domains, so must the Israeli security establishment learn to better shape developments in both military and nonmilitary domains. Every agency in the Israeli security establishment must take part in the work of finding new ways to achieve new ends. Further, an effort must be made to include NGOs and the private sector in this process. To paraphrase France's World War I prime minister Georges Clemenceau, the transformation needed today is too broad and important to be left to the generals. This paper proposes six lines of effort—diplomacy, information, military, economy, law, and home front. Each line will require tailored intelligence support and should be networked within the public sector while having private-sector entities engaged in the same activity. Embracing a strategy that incorporates expanded lines of effort and a broader cast of actors and contributors is essential to any effort to transform Israel's security establishment to meet the demands of the changing regional environment.

One cannot but wonder at the absence of the cyber domain from this list, an inquiry to which the answer is threefold: first, the cybernetic revolution is a (if not *the*) main cause of the strategic problems described here; second, cyberspace is actually present in every line of effort, defensive and offensive, and as a means to achieve desired outcomes; and third, it appears too early to determine that the cyber domain constitutes a separate line of effort, and overemphasis of its independence can be potentially damaging at the national level. Indeed, as a separate line of effort, it might grow stronger on account of other lines, decisionmakers might overestimate its role, and its overuse might have a boomerang effect on Israel in the international arena.

DIPLOMACY. The Israeli defense establishment as a whole is trapped in a vicious cycle. Decisionmakers tend to fail to see the nuances of the diplomatic aspects of security challenges, leading them to marginalize Ministry of Foreign Affairs (MFA) professionals during routine discourse and when crises occur. The corresponding lack of constant engagement cripples the possibility of effective collaboration at the onset of crises. For their part, many MFA professionals are detached from policy decisions regarding security challenges and, therefore, lack the needed skills and know-how to provide a constructive role in such policy decisions. Thus, both sides perpetuate the problem.

Israel needs a stronger diplomatic corps that is fully and professionally engaged in strategic planning and operational execution. Decisionmakers

should acknowledge the importance of the diplomatic ways and means for today's security environment. They also should empower MFA professionals to routinely provide analysis and assessment to support decisionmaking as well as provide concrete diplomatic action plans to attain national objectives. At the same time, a revamped diplomatic apparatus should educate and train its personnel to gain the skills needed to effectively provide support during decisionmaking cycles in peace and war.

INFORMATION. For too long, Israel has marginalized the information field, leaving it open to its adversaries. But the war of narratives is often as important as war's other dimensions, if not more so. Israel must acknowledge that its image as Goliath is partially the result of neglecting this line of effort and, thus, letting its enemies drive the narrative. Israel thus needs to invest in and broaden the scope of its human, material, and organizational resources to compete in information warfare.

Israel also needs to develop its messaging and countermessaging skills, using governmental capabilities as well as nongovernmental assets such as Israeli and international NGOs, the Jewish diaspora, and influential individuals. In doing so, it must differentiate between two target audiences in building its outreach capabilities, the first being international doubters of Israel's message, the second being those who generally find Israeli sources trustworthy. To the latter, Israel can deliver its message directly, but the primary audience is the tougher nut to crack. Its members do not trust any direct Israeli messages and therefore gather their information from other sources. To this audience, Israel must gear its messaging indirectly and with much more sophisticated methods. In designing its messaging, Israel needs to take into account the human factor of informational warfare—namely, cultural, religious, and ideological factors.

While accounting for the delegitimization challenge outside the region, Israel should take advantage of two new realities in its efforts to replace the Goliath image: (1) the Israeli-Palestinian conflict is not perceived as the only Middle East story or the cause of every single problem in this region; (2) Iran and Salafi-jihadists have become the antagonists. With Israel not seen purely as a pariah state, it can develop a new image as a useful neighbor on the block—tough but trustworthy and fair and sometimes helpful.

MILITARY. Because success on the battlefield under current circumstances will not likely be decisive, and certainly not decisive enough to ensure long-term strategic and political success, the shortfalls of the current military par-

adigm are conspicuous. To accomplish the suggested strategic vision, Israel needs a national security doctrine that will allow it to compete successfully at various levels of conflict and in various domains, not just, as noted, the strictly military domain. Within this framework, the IDF should be focused on the challenge of developing and implementing protracted and multidimensional campaigns, and be prepared to conduct creative limited military operations as well as nonkinetic operations to promote political goals. The military should also serve as a “problem framer” at the strategic level, not just as a “problem solver” at the tactical level—that is, as an agent actively and inclusively involved in war’s numerous nonmilitary aspects. This kind of military apparatus must educate its members to acknowledge the importance of strategy, change, learning, and adaptation; recognize new patterns when they emerge; and invent new methods for doing old things. It must also become a team player in the entire defense establishment and create the proper organizational and cultural preconditions to allow for such a development. Needless to say, it must still be able to compete successfully in the military domain.

ECONOMY. Competitions between actors are about resources along with other issues. In the proposed strategy, the Israeli economy becomes an instrument in the tool kit, not only to promote growth, preserve existing resources, and create new resources but also as a strategic means of promoting security. This is done by creating and leveraging Israeli advantages (e.g., research and development, energy and cyber industry, scientific infrastructure, and technological innovation) to benefit its neighbors, while exploiting the economic vulnerabilities of Israel’s opponents. The Israeli economy, through the leadership of the government, innovative regional and international partnerships, and networks with the private sector, can play a key role in promoting the strategic vision while minimizing threats and obstacles.

LAW. Israel is becoming more adept at lawfare and has skillfully developed its defensive lawfare capabilities in recent years. Within the last decade or so, Israel often found itself under legal attack and scrambling to explain its actions after the fact. Examples include erection of the security fence in 2004, interdiction of the Turkish ship *Mavi Marmara* in 2010 and its resultant casualties, and responsibility for civilian casualties among the Lebanese and Gaza populations during conflicts in 2006, 2008, 2012, and 2014. New methods were developed in response to litigation whereby legal agencies at the Ministry of Justice, MFA, and IDF—together with planning, operations, and intelligence agencies—learned to cooperate, share information, and exploit

organizational advantages. The agencies gained needed experience, and the military and civilian cadres learned to conduct the defensive campaign more and more effectively.

Yet defensive lawfare is especially difficult in large-scale confrontations, where friction is heightened, the scarcity of resources becomes acute, and the military focus naturally shifts to the military line of operation. The IDF has improved its integration of legal affairs into military planning, but it should invest more to integrate the capability toward better collecting and sharing information in real time to support a defensive legal campaign. Israel also needs to better integrate this component in the operational planning processes, to allocate the necessary means for deployment, and to build its forces accordingly.

The Israeli security establishment is still reluctant to conduct offensive lawfare campaigns. This is largely because such an approach calls for accusing enemies of war crimes and requires a high evidence threshold, risks exposing intelligence sources, and entails an uphill battle against the embedded political bias of some international forums. Nevertheless, the prolonged war against terrorist organizations and violent nonstate actors that Israel, the United States, and others are conducting requires a more proactive, focused, and orchestrated legal effort.

The constant problem of scarcity of means can be ameliorated with an improved awareness of the networked nature of lawfare. Israel's approach to the problem is too state-centered, while the vast majority of needed resources are located in the private sector and NGOs, most of them not in Israel. Thus, this legal line of operation falls directly into the category of public-private partnerships.

Intelligence collection and assessment must also be integrated into lawfare. This is necessary, first, in order to know the enemy as a legal entity and thus identify risks, threats, vulnerabilities, and opportunities for proactive campaigns, and second, to improve the precision and efficiency of the Israeli legal effort. Israeli intelligence support to the legal line of operation is currently episodic and inconsistent and therefore insufficient. The principal explanation is that orthodox military collection and assessment is prioritized above lawfare intelligence. The legal effort needs to be recognized, professionalized, and better resourced.

HOME FRONT. Comprising the public and its ability to enjoy personal security and a normal life in times of war and peace—as well as physical assets

that define Israel as a developed economy and symbolize its sovereignty—the home front has grown in importance as a key component of Israel's national security. Yet its integration into national security doctrine remains in the very early stages. In particular, the linkages between passive and active defense, and between defensive and offensive measures, are not yet defined in a well-developed, coherent doctrine. Nationally, the field suffers from a lack of unified responsibility and authority, a gap being filled by the security establishment's strongest agency—the IDF—whose traditional tasks and ethos are at odds with home front operations. Moreover, the absence of a clear chain of command and authority, as well as overbureaucratized responsibility at the national and the municipal levels, results in chronic friction, organizational complexity, and ambiguity. Approaches to the home front require broad networking and consistency in policy. Instead, current approaches are characterized by a misuse of resources and incoherent short- and long-term planning. Much needs to be done in this line of effort.

In summary, only an integrated security establishment with a coherent national security doctrine will be able to develop a comprehensive understanding of the threats facing Israel. Furthermore, this will require allocating sufficient resources across all six national lines of effort, rather than the lion's share going to the military as it does now. "Force planning" and "force design" should encompass all six elements of national power, be based on security requirements pertaining to anticipated threats and opportunities—rather than a technical process of budgeting—and reflect a new balance in this expanded vision of what constitutes "security." A security apparatus capable of conducting limited, not necessarily kinetic, "security" operations and creating effective multidimensional strategies will be fundamentally different from the war machine Israel has built to win decisive wars.

REVAMPING THE SECURITY ESTABLISHMENT

RECONCEIVING Israel's security establishment so that it addresses the current threat environment will require focusing on items heretofore neglected, from use of language to a fresh approach to strategic thinking.

NEW VOCABULARY

The kind of critical self-reflection and exploration needed to envision a new Israeli security establishment requires a new vocabulary. Some of it can be borrowed from outside sources, and some will of necessity be created during the process of transformation.

The Israeli security apparatus, like other action-oriented organizations, operates from a limited repertoire of prerehearsed, stereotyped responses. Decisionmaking processes frame problems to make them amenable to the existing methods and, thus, often avoid dealing with the unfamiliar aspects of problems on their own merits. Instead of engaging in a heuristic and comprehensive approach by examining a broad range of analytically based alternatives, current processes attend to a few variables and discard much relevant information.

The Israeli vocabulary on strategic thinking in particular must be expanded. The existing terminology, based on “deterrence–early warning–decision–defense,” does not suffice²⁸ for dealing with today's adversaries. The security establishment should thus internalize and institutionalize the doctrine and methodology of strategic competition for the long haul and reshape its strategies and operational designs accordingly. This, by itself, will generate different types of discussions between the various involved echelons and agencies and will lead military and nonmilitary planners to pose new—and substantively different—questions for their intelligence counterparts. Senior leaders should facilitate, encourage, and nurture this dynamic.

ENHANCED KNOWLEDGE OF LIMITED CONFLICTS

In seeking to achieve a better understanding of limited conflicts, the security establishment must nonetheless recognize that strategic competition may escalate to a situation in which military force may be required for a period. But the goal here is the quickest possible return to nonmilitary competition. Preparing for these scenarios requires a deeper, more nuanced effort than military planners are accustomed to giving when planning for conventional wars. Examples of challenges include setting clear and adaptive political objectives that resonate with broader goals for the competition; discussing the linkages between military (and other) means and political ends; establishing entry and exit strategies when military conflict occurs; engaging in postconflict planning and multidimensional war planning orchestrated with the various national lines of effort; phasing; requirements for plan adjustments; and adaptive planning for limited challenges.

STRATEGIC THINKING

Because it is involved in several simultaneous competitions in the region, Israel often focuses on short-term tactical gains. Thus, it suffers from substantial gaps in understanding the broad nature of these competitions, as well as its own enduring strengths and weaknesses in each. If the desired future outcome can be defined as Israeli victory, then Israel needs a “theory of victory.” Strategy is essential to develop a political, economic, and societal—not only military—theory of victory.

Given the adoption of an updated paradigm of understanding, outlined earlier, the Israeli security establishment can more effectively engage in the realm of strategy. But what is strategy? A single definition cannot capture the complex and myriad nature of the concept. Therefore, the following passage combines multiple definitions²⁹ and attempts to highlight different aspects of *what* strategy is and *how* to practice it:

Strategy is a constant dynamic that combines two components: a “discursive” component focused on reflection and knowledge creation, and an “executive” component focused on adaptive planning and implementation.

The *discursive component* refers to the learning process involved in defining a problem derived from a competitive situation, identifying and creating alternative asymmetries that can be exploited to an actor’s advantage,

and accurately assessing consequences in order to fit the right alternative to the problem.

The *executive component* refers to the process of achieving one's ultimate objective while: managing the various moving parts of reality over time; overcoming scarcity of resources and other constraints; opposing efforts of adversaries or competitors to thwart, trip, and impede; and setting conditions to respond to the inherent unpredictability of strategic outcomes.³⁰

In order to win competitions, according to the approach proposed in this paper, Israel must develop "competitive strategies."³¹ Unlike conventional military strategy, competitive strategy does not focus on wartime and does not seek decisive victory. It focuses instead on the long term and on advancing national interests while using all instruments of national power, in peacetime as well as war, to shape the competitor's behavior and force it to play Israel's game (in this case) by Israel's rules.

To improve strategic competence, Israeli decisionmakers and planners must overcome the typical organizational and bureaucratic routine that, by default, constrains effective implementation of the discursive component of strategy—a tendency that strengthens the false notion that strategy is an illusion.³²

Israel must also learn to compete simultaneously with multiple actors in various arenas. Since confrontations diffuse to every domain of human interaction, every domain must be perceived as part of the competition. Adopting this perspective should lead the security establishment to discuss how to strategize and plan for complex competitions. This discussion must address several key issues: Who should get the responsibility, authority, and resources to run each segment of the competition? How will all the segments at higher echelons be orchestrated to achieve coordinated thought-through competitions? How will the bureaucracy be networked to maximize the effective exploitation of scarce resources?

Strategy is indeed "hard to get," meaning formulate and implement, and scholars specify several reasons why this is so.³³ To begin with, strategies are guesses about how events will eventually play out; they address "wicked problems"³⁴ that, by their very nature, have no definite problem statement, specific stopping point, or engineered solutions. Resources are almost always limited, thereby constraining strategic choices. This statement may seem like common knowledge, but decisionmakers nevertheless often fail to grasp to what extent resources constrain objectives. Indeed, the limited predictive abilities associated with human decisionmaking significantly constrain the ability

to make the most efficient choices, and consequently decisionmakers consider only a limited number of alternatives. Most of the complex judgments humans make are intuitive in the everyday sense of coming to think quickly and effortlessly.³⁵ Goals are, in turn, often conflated with strategies to achieve them, with insufficient effort and attention devoted to execution. Insufficient effort is likewise devoted to implementing strategy.

In the Israeli context and others, strategy is thus determined by established organizational behavior, often reflected in standard operating procedures. Therefore, the road to a new strategy begins with forging new behaviors, new procedures, and, in fact, new organizations.

COMPETITIVE STRATEGY

Two concepts form the foundation of a coherent competitive strategy: rationality and interaction.³⁶ Here, *rationality* entails understanding—and incorporating into the analysis of the strategy—the psychology, culture, and nature of bureaucracies, which are relatively more predictable in their behavior and responses than individual humans.³⁷ Rationality is imperfect in most bureaucracies, given the tendency, first, to make simplifying assumptions about problems owing to not acquiring all available information, and second, to stick to previously successful, but no longer applicable, routines. *Interaction*, meanwhile, refers to the need to acknowledge the sophisticated, capable attributes of the opponent. Against the too common assumption that competitors make strategic choices mainly owing to their own competitors' actions, it must be acknowledged that the choices open to competitors are constrained not only by resources and politics but also by their concrete rationality. Furthermore, it must be acknowledged that these interactions may play out over years or decades and that, therefore, time matters. Finally, one must understand not only what a competitor is doing but also why—this requires getting inside the competitor's decisionmaking process and doctrine.

In general, four generic competitive strategies can be combined and adjusted in an overall long-term strategy, in both peace and wartime: denial, cost imposition, an attack on the enemy's strategy, and an attack on the enemy's political system. The first two focus on influencing the bounded rationality of the adversary's cost-benefit calculus—that is, does the end justify the cost?—while assuming that interactions are unpredictable. The last two try to manipulate the terms of interaction by baiting the competitor into a series of self-defeating reactions based on information dominance and maneuver (see Table 2).

By shifting the paradigm to one focused on competitive strategy—and building the necessary capability to develop it—Israel must prioritize the creative approach over the mechanical approach for three main reasons: (1) the numerous asymmetric dimensions in the competitions; (2) structural scarcity of means and political will; and (3) the benefits of proactively shaping the effort. Furthermore, some of Israel’s opponents use exactly this strategy against it. They understand, based on what they perceive as a vulnerability in Israeli political overreach, that Israel will eventually hit the limits of its political and economic will and capability. Put differently, the mechanical approach is the privilege of an actor that enjoys multiple advantages, or that only seeks to preserve and defend the status quo.

TABLE 2: APPROACHES

| | <i>Bie</i> * (attrition-based) | <i>Metis</i> ** (maneuver-based) |
|------------------------|--------------------------------|--|
| Ends and means | Denial | Attacking the enemy’s political system |
| Will and psyche | Cost imposition | Attacking the enemy’s strategy |
| | * Direct kinetic force | ** Guile |

ADOPTING NEW METHODOLOGIES

Updating the Israeli security approach will also require adopting different methodologies, such as concepts from “operational art,” and introducing more debate into decisionmaking, among other changes.

A principal challenge for orthodox military and defense institutions is the continued diffusion of war across boundaries, involving every dimension of human activity and power, exploiting democracy’s vulnerabilities, and making militaries only partly crucial to strategic success. Today’s wars also transgress time and space, breaking down the industrial way of war and rendering obsolete previous planning paradigms, war machines, command-and-control architectures, and executions of war plans.

**EMBRACE BUT
REVISE THE
OPERATIONAL-ART
CONCEPT.**

While shaping its new way of strategic competition, Israel must close major gaps between (1) politics and the conduct of war and (2) military and non-

military lines of effort. A key to bridging these gaps is examining the potential role of operational art³⁸ and systemic operational design—the methodology for applying operational art in military planning—in the Israeli transformation.

From the 1990s until 2006, the IDF pursued its own effort to institutionalize operational art within its military paradigm.³⁹ This wave of military innovation ended after the 2006 Lebanon war, when operational art was one factor blamed for the war's poor conduct. It was thus thrown away as part of the “back to basics” approach that persists today. This approach disconnects the tactical means of battles from the strategic ends of wars, and focuses on tactical excellence alone, while leaving strategy to the political echelon.

The discarding of operational art amounted to throwing out the baby with the bathwater. Compared to other military or even business methods, operational art and the systems-based approach undergirding systemic operational design⁴⁰ remain effectively the most relevant methods for holistically understanding and preparing for war by connecting war's political goals to emerging forms of warfare—in other words, giving concrete form to war's political ends. These methods should therefore be part of Israel's journey toward security transformation. However, the military notion of operational art must be critically revised as well, given changes, discussed earlier, to the nature of war and the ways and means of warfare.⁴¹

The new security environment, as discussed, complicates planning, decision-making, and execution. It requires a near-real-time fusion of the political,

**REEMPLOY THE
CONCEPT OF
THE SUPREME
COMMAND.**

military, and security echelons and a holistic and nuanced approach to strategy. The government, together with the professional echelons, must tailor relevant approaches to entirely unique situations.

Based on their planning expertise, senior military officials and military strategists must learn to serve not only as military advisors but also as integrators of all aspects of strategic competitions while interacting with the political echelon. In this process, they must refrain from simply presenting menus of possible action. In contingencies, they need to acknowledge their role of providing higher-ups with insights, beginning with the first battlefield engagements, to help them frame the war's goals, coherently allocate means for the war, and enable a thorough calculation of the costs for achieving goals. Military leaders need to rely on staff to provide this information, and staff must learn to provide the right inputs to the ends–ways–means strategic discussion. Furthermore, since the goals and form of a competition's

intense episodes only emerge within the crisis, professionals and politicians must interact routinely to collaboratively discuss alternatives, available and needed tools, costs and implications, correlation between ends and means, and so on. While prime minister, David Ben-Gurion founded a fused civil-military war cabinet; today, Israel needs a fused cabinet, or Supreme Command, to engage in strategic competition. *The security establishment has a key role to play in educating politicians for this development.*

Instead of allowing the usual set of elite officials to frame problems and solutions, more players need to take part in a systematic, debate-based process that relies on trial and error and wherein solutions evolve piece by piece. The process of defining a security problem and the needed ends-ways-means cannot be achieved by an authoritative top-down process leading from decisionmakers to planners. Instead, a more effective method would entail an iterative, discursive, and systematic approach rooted in routine consultation and engagement in learning processes aimed at informing overall decision-making, execution, and evaluation.

**USE A
DEBATE-
BASED
PROCESS.**

This general suggestion raises a series of questions regarding command, control, responsibilities, expertise, and professionalism, along with questions on the role of the political echelon and what will enable its success. But three absolutely clear imperatives emerge from this discussion: (1) The political echelon should demand strategic-thinking products and should help produce them. (2) Establishing an inquiry- and learning-based mode of decisionmaking will require breaking down organizational barriers within Israel's security apparatus. (3) The components of this security apparatus must be rebalanced.

To instill an ethos of transformation in the Israeli security establishment, senior-level managers must demand change and personally lead this process.

**ENTER THE
UNCERTAIN
DOMAIN OF
TRANSFOR-
MATION.**

To do so, they will need to help break deep-rooted habits. In any large organization, leaders typically work to increase and maintain the security and comfort level of subordinates in order to increase their effectiveness. Ironically, amid an ever-changing outside environment, such a behavior contributes to stagnation and limits the potential for organizational change. Therefore, senior leaders of the Israeli security apparatus, as well as at the political level, should instead acknowledge their

role as entrepreneurs and increase the discomfort level to push their organization across the threshold toward change.⁴²

Furthermore, since most IDF and other security officials will not remain in service long enough to see the fruits of a transformational initiative, they are usually reluctant to engage in such processes—thus the preference for short-term and small-scale adaptations. As a result, if champions of change initiate a major course shift, they must build trust in their intentions, help skeptics overcome doubts, and prevent stalling until the principals' terms end to ensure the change process takes hold.

In defense-related organizations, the leadership tends to be authoritative especially in times of uncertainty and complexity. Leaders thus seek to provide their organization with confidence regarding the “right” solutions. As implied before, this behavior increases the passivity of subordinates and can cripple a quest to redefine problems and explore new ways of doing business. Leading by questions and focusing on problems are necessary steps particularly when the problems are daunting.

Long-term strategic competitions are characterized by constant changes in the pace of military and nonmilitary operations. But interactions between the belligerents and with other actors, and the related friction within the international system, change the status, directions, and characteristics of the competition. Thus, a security establishment must institutionalize constant learning and adjustment based on an improved and self-reflective situational awareness, such as by appointing chief transformation officers in subunits or creating an interagency “senior continuous transformation board.”

COOPERATION

Since Israeli independence, a key principle underpinning the country's national security doctrine has been self-reliance. Although still relevant to a certain extent, this principle today limits Israel's ability to advance its national interests. Since the security challenges it faces and the required response, as discussed earlier, are too great for Israel to handle by itself, some level of interdependency and international cooperation is necessary and should shape Israel's foreign and security policies. In certain cases, for instance, investment in developing relations with foreign actors and the alignment of external resources can contribute to Israeli security more than developing a new weapon system. To this end, the demands created by current realities can help the security establishment overcome its deep-rooted tendency to maximize independence.

If carried out correctly, participating in a coalition can be a force multiplier. Teamwork may be counterintuitive for Israel, but it is an imperative given current conflicts and competitions. Today's coalitions have loose ad hoc characteristics; interests, more than ideologies, form their basis and every coalition is unique.⁴³ To tread the coalition and cooperation line, Israel should first clarify its long-term interests and political objectives in order to identify partners with common interests.⁴⁴ Shared objectives can then be calibrated and opportunities for cooperation facilitated. Continuous investment is required for cooperation in coalitions, which often must react quickly and thus allow a narrow preparatory window. Thus, if Israel wants to be successfully involved in coalitions, it should invest strongly in their infrastructure, an approach that transcends the mere transactional and the expectation of a quick payoff.

Operating in networks and coalitions requires a different set of skills from that traditionally expected of Israeli leaders, including: a consultative approach to decisionmaking, active listening, the ability to compromise on interim objectives while focusing on the common higher aim, the pursuit of a wide range of alternatives, the ability to balance participants' competing priorities, flexibility and creativity in structuring command-and-control mechanisms, sensitivity to cultural differences, patience while building trust and creating a common language,⁴⁵ and adaptability in facing the evolving challenges to cooperation over time and under changed operational or domestic circumstances.

THE ROLE OF INTELLIGENCE

For Israeli national security, intelligence is crucial to the effectiveness of all organizational outputs and necessary to obtain basic information to support strategic decisionmaking. In a balanced security establishment of the future, intelligence must be expanded to every domain of strategic competition. Networked agencies will be able to integrate assets and sensors to tame the ever-growing hunger for information, have access to an integral database from which they can pull needed data, share assessments, and accomplish tasks in every line of effort. In wartime, accurate targeting and execution will provide relevant intelligence to sustain learning and adaptation. Given this kind of exploitation of intelligence, areas such as education, relations, trust, and technologies will need to meet ethical challenges and cybersecurity demands.

Israel's warning community is too limited and too orthodox to deal with today's ecology of warning from emerging threats, many of them nested in the private sector, and should build partnerships with domestic and foreign agen-

cies to increase its effectiveness. Meanwhile, the traditional compartmentalization within the intelligence community must be broken, with routinization and structure replaced by more of a self-evolving cooperation.⁴⁶ This reality applies to the United States as well as Israel. In a way, it takes a network to identify and understand—and eventually defeat—a network.

THE ROLE OF MANEUVER

Accompanying the decline in conventional interstate wars is a disappearing space for open maneuver because of rapid urbanization. Relatedly, the desire to fight neat and clean wars relying solely on standoff weapons collides time and again with two tough realities: first, as much as the IDF and other Western militaries improve their firepower, their efficiency does not improve to the same degree; and second, the objectives and requirements of new forms of war necessitate the capability to operate on the ground—and underground. This will require new forms of maneuver warfare not only to effectively achieve tactical objectives but, even more important, to efficiently promote operational psychological and political goals, probably while operating in ways that were neither planned, prepared, nor rehearsed. The need for maneuver warfare conflicts with decisionmakers' common preferences. Consequently, a steady erosion of the maneuver paradigm has occurred within the IDF, a trend that must be reversed.

While building and maintaining adaptive maneuver capability at the tactical level, the IDF, together with the political echelon and other nonmilitary agencies, must address three major issues relating to future maneuver warfare: its *goals*, *logic*, and *form*, with an eye to political, economic, international, and domestic realities.

GOALS. While attrition of enemy capability is a constant military objective of maneuver warfare, it should not be perceived as the ultimate goal. Military theorists throughout the last two centuries have argued about the psychological effect and the political objective of this form of war. In the Israeli reality, concrete goals can vary from shortening a war's length, to taking it to the enemy's territory, to taking the initiative and gaining operational leverage through war, to gaining strategic leverage for the negotiation that will follow.

LOGIC. Since war is dispersed in space, extended in time, and crosses domains, the logic of maneuver warfare must counter the enemy's rationale in all three modes of the engagement. To these ends, the logic of maneuver should be political rather than military; force the adversary to concentrate

rather than disperse; strive to gain an operational advantage within the war in order to win the clash of logics; and create strategic leverage to be exploited in the postwar environment. Importantly, the logic should not be a rigid, fixed, preset one, but a preliminary, flexible logic open to adaptations during the initial phases of the military engagement.

EDUCATIONAL IMPLICATIONS

Even as the current training system is important at the lower echelons and creates high levels of tactical expertise in executing known tasks, this system is insufficient for developing strategic and operational expertise and competence at the senior echelons. Thus, senior officers tend to think tactically, rather than strategically and operationally, hoping that experience rather than education will prepare them properly for their jobs. At the middle and higher levels of the security establishment, then, education in identifying, framing, and eventually executing new tasks is just as important as, if not more important than, training in the existing curriculum, with its focus on tactics.

Alongside the need for strategic and operational education, professional war education must encompass both the military and nonmilitary dimensions of conflicts, and conventional and unconventional conflicts. At the same time, professional education must provide senior-level figures with better managerial and entrepreneurial skills, rather than only developing their executive skills and can-do approach. Perhaps understandably, security establishments tend to emphasize traditional military skills training, with limited emphasis on managerial and entrepreneurial training, hoping that operational experience will prepare senior officers for managerial and entrepreneurial positions. But in today's complex environment, these nonmilitary skills need to be taught systematically and professionally. Here, again, the civilian arena has already taken the lead and can offer a broad and useful body of knowledge.

Finally, nonmilitary officials should have better access to professional education regarding warfare, strategic competition, and national security affairs so that they too can become efficient and effective members of the security establishment. And not only senior-level officers, but also mid- and high-level officials in other segments of the security apparatus, must learn the theory and practice of strategic thinking.

GETTING THERE: TRANSFORMATION THEORY

BEFORE addressing specifics on the needed Israeli transformation, this paper will present the theoretical underpinnings of military transformation and examine a recent attempt to transform an Israeli military subunit, the Department of Military Intelligence (DMI). In an ever-changing strategic environment, militaries need to preserve and exploit their existing paradigm⁴⁷ as well as explore technologies, operational concepts, and tasks that will lead to a new paradigm suited to the changing environment.⁴⁸ The field of military transformation tries to understand to what extent security establishments in general and military organizations in particular succeed in developing effective new paradigms to match changed environments.⁴⁹

The imperatives of military transformation include enabling technologies, unmet military challenges, a combination of equipment and operational concept of implementation, a challenge to the approach pursued by one of the subagencies, a receptive organizational climate, support from the top, and a culture that encourages experimentation.⁵⁰

The literature identifies numerous variables that determine to what extent transformation processes succeed. Each school of thought emphasizes a certain variable as the key factor enabling the transformation, with the fundamental division in the literature being between exogenous variables and endogenous variables.

The outside-in approach to military transformation (see figure 1) highlights influences such as changes in the security environment, domestic societal changes, new technologies, and new demands from the political echelons.⁵¹ Although external developments and threats can stimulate changes, a closer examination of military history⁵² shows that, because of internal organizational dynamics, these stimuli are insufficient for sustaining a significant transformation process toward a new paradigm.⁵³

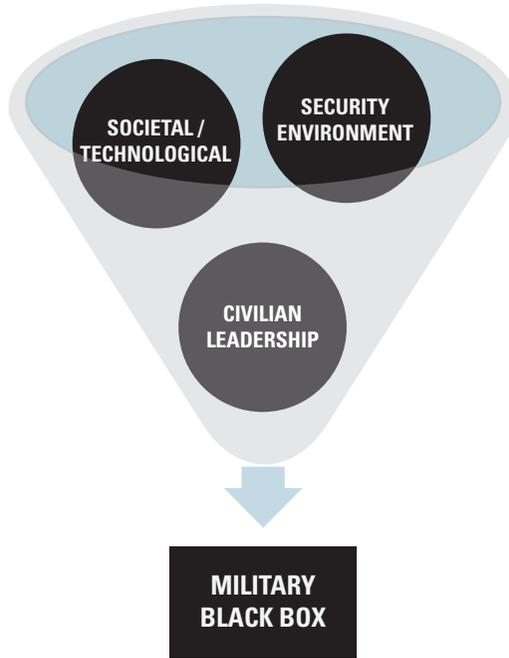


FIG. 1: OUTSIDE-IN APPROACH

The inside-out approach to transformation of security establishments highlights material or ideational motivators (see figure 2). The material motivators include the promotion of specific individuals committed to transformational change, the deliberate creation of competition within the organization, a focus on cognitive elements, power shifts within the organization,⁵⁴ and other incentives, rewards, and punishments. The ideational motivators, also described as the cognitive-cultural approach, include the presence or absence of trust and organizational norms that nurture a climate conducive to exploration and the free flow of new ideas,⁵⁵ horizontal and vertical communication,⁵⁶ and continuous professional learning.^{57,58,59} Although the necessary internal mechanisms are present in this approach, it cannot alone facilitate transformational change; instead, a combination of approaches must exist for change to happen.

Furthermore, a nuanced examination at the microorganizational level exposes the shortfalls of these two theories when applied in isolation, including their failure to account for the following: numerous aspects of transformation, such as the existence of competing incentives for innovation and

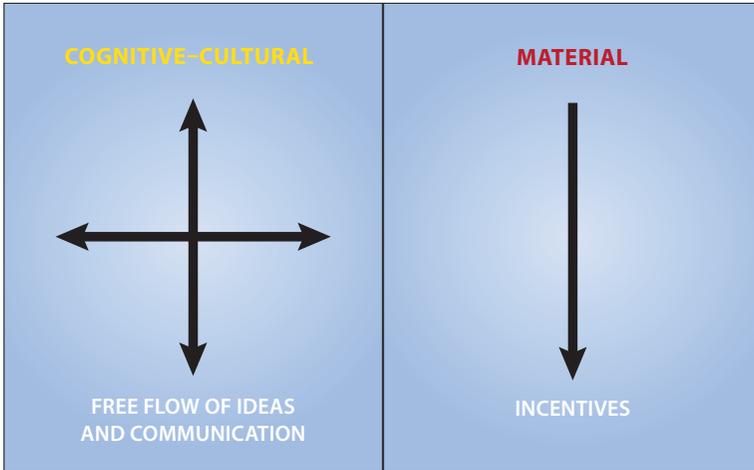


FIG. 2: INSIDE-OUT APPROACH

stagnation, as seen in the influence of interest groups that promote narrow institutional (e.g., service arm or branch) perspectives; different trust levels within the hierarchy and between the subunits; an asymmetry of access to information between senior officials, who are focused mainly on ends, and junior officials, who are focused mainly on means; an organizational tendency to stick to routine tasks; and the reluctance of principals to explore new tasks, which depletes training capacity.

Yet another approach (see figure 3) seeks to address the inside-out model's shortfalls, described earlier, by adapting the "principal-agent problem" theory specifically to transformation in security establishments. According to this theory, the principal is the commanding entity and the agent is the subordinate,^{60,61} and the agent can actively or passively respond to a principal's directive in one of two broad ways. The agent can comply with the principal's directives actively by not only embracing the call for change but proactively pursuing uncharted pathways, or the agent can respond passively by meeting only the minimum requirements needed. Alternatively, the agent can shirk the principal's directives actively through subversive and opportunistic efforts to promote his or her own agenda, or even collude with other entities to actively block transformation. Taking a passive approach, the agent can impede change by enacting cosmetic and reversible adjustments or hiding crucial information.⁶²

Principals, therefore, must not only possess leadership skills and knowledge of organizational change methods, as found in the literature, but also continuously balance three sometimes contradictory imperatives: the invest-

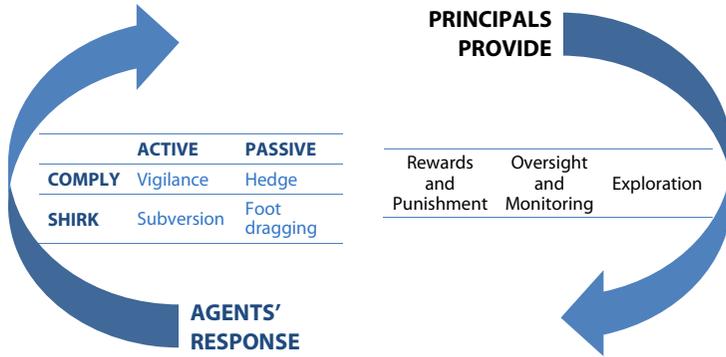


FIG. 3: MICROORGANIZATIONAL PRECONDITIONS

ment of time and resources toward exploring innovation and promoting a free flow of ideas; the provision of incentives for agents to comply; and the removal of incentives for shirking.

Principals also need to invest time and resources in collecting information about the transformation and, as needed, punish agents for shirking. This effort will challenge principals to: (1) find the most cost-effective oversight regimen possible so as to devote maximum resources to the actual transformation; and (2) do so without exposing the organization to threats from the ever-changing security environment.

Over the last four decades, the Israeli security establishment itself has faced—and is still facing—seismic shifts in the security environment, including the international, regional, and domestic societal arenas. It has adopted numerous new technologies and required the political echelon to accomplish new tasks. Nevertheless, the scope and scale of changes within the security establishment are relatively limited compared to the exogenous changes. Drawing from past experience, then, one should not assume that outside forces, however dramatic, will eventually compel a fundamental change in the Israeli security establishment. Instead, the key to future transformation is in endogenous organizational factors—both cognitive and material—guided by the principal-agent perspective.

TRANSFORMATION: A CASE STUDY

An account of the massive attempted transformation at the DMI was published in the IDF periodical *Bein Haktavim* (“Between the Poles”),⁶³ which focuses on operational art and whose second issue, where the article was pub-

lished, addresses the challenges associated with transformation and change. Although the article provides only a partial account of the DMI effort, it still gives insights into the challenges of broad military transformation that can help generate more concrete broad recommendations.⁶⁴

In the article, “Maaseh Aman,”⁶⁵ the authors, Maj. Gen. Aviv Kokhavi, the head of the DMI, and Col. Eran Ortal, describe a three-year-long effort to adapt the organization to the new security landscape and highlight the imperative of transformation in military systems. The article’s first part describes the content of the transformation, and the second part evaluates the transformation process itself, which was based on the principles elaborated by Peter Senge in his article “The Fifth Discipline.”⁶⁶

While introducing the roots of the effort described, the authors uphold the argument that external changes are insufficient to generate a major organizational change. They describe two decades of an erosion of the traditional paradigm, whereby the linear logic of the intelligence enterprise was undermined by regional, political, socioeconomic, and technological developments—e.g., years of political negotiation, the second Palestinian intifada, the nuclearization of Iran, the second Lebanon war, the region’s proliferation of advanced standoff capabilities, and the IT revolution—that nonetheless failed to spur a large-scale transformation in the DMI’s way of doing business. Furthermore, many officers in the organization believed that the existing paradigm, with minor adjustments, could still address the new realities of interdicting arms transfers, understanding deep-rooted social trends, targeting, and urban maneuver; they likewise used various shirking techniques to maintain the status quo. This narrative would seem to confirm the shortfalls of the outside-in approach to military transformation.

As a commander, Kokhavi observed an organizational culture characterized by cynicism and mistrust caused by previous unsuccessful attempts at transformation. Consequently, he understood he had to be personally involved in the process and not just champion it from above. He decided, together with his senior-level staff, to base the transformation on the following seven principles:

■ **COLEADERSHIP BY ALL THE SENIOR COMMANDERS**—who were to function as a steering committee, take part in the learning, and monitor progress.

■ **BROAD DEFINITION OF OBJECTIVES**—regarding the vision, mission, structure, procedures, and culture of the organization.

- **SYSTEMIC LEARNING**—a collaborative, nonhierarchical approach and critical reflection on past trajectories that created gaps between internal orthodoxies and external needs.
- **PHASED PROCESS**—beginning with vision design and moving to planning, execution, and evaluation.
- **INCLUSIVENESS**—incorporation of the most possible officers in the process. This principle was implemented by ten integrated groups within the DMI that focused on issues such as technology, cyber, covert warfare, resources, and the entire Israeli intelligence doctrine.
- **ECOLOGICAL PERSPECTIVE**—a combination of intraperspective (looking into the organization) and intersperspective (looking outward to the external organizational environment).
- **ADAPTABILITY AND FLEXIBILITY**—acknowledgment that reality will not wait for the organization to transform and that it will therefore need to constantly reflect, adapt, and adjust.

The design phase ended with the definition of unmet military *challenges* (intelligence at the tactical level, understanding of networked enemies, balancing of expertise and interdisciplinary approaches, cyber, and interoperability) and *enablers* (networked intelligence, empowered subunits, empowered staff, interarena analysis, agility, culture, command and leadership, organizational openness, people, and resources). It also resulted in the coining of a concept—intelligence-based warfare—defined practically as a very detailed and accurate tactical intelligence provided in real time to ground combat units to empower and enable them to exploit their firepower.

But most important, according to the authors, the tailored process changed the organizational atmosphere, creating a common understanding of the need to transform as well as enthusiasm and willingness to step outside personal and organizational comfort zones and participate.

During the planning phase, thirteen groups, each consisting of about a dozen midlevel officers, worked simultaneously based on the principles of freedom of operation, trust, continuous learning, cross-organizational participation, horizontal and vertical coordination, and seniority.

In order to prevent shirking, commanders of the subunits oversaw the implementation phase, monitoring progress and seeking to prove that “this time it is for real.” This phase was accompanied by additional learning and reflection facilitated at the steering committee level. At the same time, the

commanders worked to broaden organizational awareness of the transformation through a collaborative and inclusive approach.

Given constant and rapid changes in the external environment, the authors highlighted the importance of “transformability” in the organization. Only time will tell whether this effort was successful. Meanwhile, some indications can help assess the entire process based on the theory of transformation.

On the microorganizational level, the authors elaborate broadly on efforts made to overcome obstacles associated with the principal-agent problem such as opportunism and asymmetry of information. At the principal end, they describe how champions of change recognized the need to share the process horizontally and vertically within the DMI as well as in IDF bureaus and arms outside the DMI. They also explain how they balanced personal exploration with oversight and monitoring. Nevertheless, the article does not touch on material incentives or the institutionalization of an incentives and disincentives system either for individuals or subunits, seen to be essential elements of long-term transformation. At the agent end, however, they describe what looks like a sustainable shift in organizational behavior from shirking to compliance and the importance of quick wins for nurturing the process.

Two important additional factors are absent in this article, when viewed according to the theory of military transformation: (1) elaboration on established avenues for promoting individuals who demonstrate commitment to sustained transformation; and (2) discussion of the impact of a certain “device” (i.e., equipment and operational concept) on the transformation. Compounding these oversights is the larger problem of the transformation being limited to the DMI and not part of a comprehensive change to the broader security establishment. In theory, the impact of a successful subunit-level transformation—referring here specifically to the DMI as one segment of the IDF—might harm the entire organization. This risk was not addressed in the article, and the effects can only be assessed after the fact. And indeed, while in principle the transformation was somewhat successful, it has had some negative effects on the IDF as a whole.

Also absent from the article is a discussion of the importance of incentives in promoting sustainable change, a theme prevalent in the literature. Specifically, short-term, merit-based approaches foster an individual desire to participate and can therefore maximize immediate benefit. Similarly omitted is a second avenue for transformation—paths of recruitment, evaluation, and promotion for officers who themselves are dissatisfied with the organizational direction yet are skilled enough to help effect change. A third unmentioned

path to institutionalized transformability is professional education. To be effective given continuous external changes, education must instill values such as collaboration and risk taking and skills such as critical self-reflection and adaptive leadership.

Naturally, the authors do not address any parallel process outside the DMI, but, notwithstanding the comprehensive nature of the effort, the mere fact of its application only to a subagency raises a second set of problems. As already noted, any large-scale change in one agency within a larger organization can potentially influence the latter, and the authors even provide evidence of such an influence on both the air force and the army. But this influence is not examined according to a larger strategic and operational vision, and its unintended consequences deserve an additional look. For example, plausible negative effects of the DMI initiative include a “feed the beast” dynamic, a positive feedback loop in which the targeting machine is supplied more and more raw materials, pushing the IDF to improve its battle efficiency rather than its strategic effectiveness and widening the gap between political goals and military means; a narrow, sectoral, and even opportunistic approach to intelligence in today’s wars and a corresponding overemphasis on the military instrument in the national tool kit; and an imbalanced investment in airpower and precision to the detriment of maneuver and ground forces.

Indeed, one can draw a straight line from the changes associated with a subunit-level overhaul to the original set of problems that brought about the transformation. For example, the DMI’s intensified focus on intelligence-based warfare resulted in an overemphasis, in the DMI’s other roles within the Israeli security establishment, on tactics. The IDF, in effect, was driven to become a machine expert at Find, Fix, Finish, Exploit, Analyze, and Disseminate (F3EAD), at the serious expense of operational guile, thus crippling strategy.

This overfocus on enemy capabilities reinforced the institutional tendency to adopt a threat- and attrition-based approach to operational planning and force deployment, manifesting itself in a generally more reactive orientation.

Despite the success at the DMI level, the risks associated with transforming only part of the military must be acknowledged. Two main problems in this context are as follows: (1) Whereas the initiative improved ties between intelligence and the air force, providing them a shared objective and interests, it failed to similarly integrate the ground forces. (2) The transformation failed to develop an operational-level concept that would enable the IDF to take the initiative during wartime and in the course of its strategic competition with its adversaries, thereby forcing the latter to fight and compete on Israel’s terms.

GETTING THERE: FIVE KEY RECOMMENDATIONS

THE BROADER transformation of the Israeli security establishment must not only attempt to answer questions regarding new approaches but also define new ends that can thus be achieved toward advancing Israel's national security interests. As discussed, the scope of the transformation must be greatly expanded.

■ **AN ALL-INCLUSIVE APPROACH.** To shift the emphasis from ways to ends, the transformation must encompass not only national security professionals but also politicians and policymakers. By fusing the security establishment with the political echelon, new ends can be formulated that enhance Israel's long-term national security yet remain grounded in pragmatism. Furthermore, an effort must be made to close gaps between military and non-military lines of effort. This will be achieved partly by fusing the military and political echelons but also through a collaborative approach between military and nonmilitary entities in the security establishment. Israel must also expand collaboration and cooperation internationally, a vital nonmilitary line of effort that could significantly benefit the country's security, overall capabilities, and national power.

Security establishments tend to be preoccupied with improving their effectiveness at executing known tasks, but this approach can simultaneously both undercut attempts to improve the organization's effectiveness and discourage efforts to define new ends. This is because the political echelon will be hesitant to set objectives that the professional echelon cannot accomplish. Therefore, the transformation must attempt not only to establish new ways and means of doing things but also new ends aimed at improving Israel's national security—and it must then convert those ends into hard tasks. In this context, including politicians and policymakers in the discussion can help bridge current gaps between ends, ways, and means.

■ **PERSONAL INVOLVEMENT OF SENIOR LEADERS.** The tendency of bureaucracies to push work down toward lower-level officials cannot be part of the recipe for transformation. Leaders must be actively and visibly involved—indeed, they must be the key champions and facilitators of the transformation. Their involvement must include providing compliance incentives for subordinates and subunits, as well as disincentives for shirkers. Only senior figures can institutionalize and facilitate a free flow of ideas, and encourage risk taking, pluralism, and self-critique. Transformation can occur as a top-down process alone, nourished by grassroots and bottom-up dynamics.

■ **TIME AND SUSTAINABILITY.** In order for the transformation to expand over time, as it should, steps must be taken to reform education, promotion, and the like. This will ensure a long-term, large-scale, and self-sustaining process, rather than a temporary tweak, even if the ultimate destination is unknown. Likewise, the future Israeli security establishment must embrace the constancy of change, acknowledge that the pace of change is increasing and its scope broadening, and be aware of its own tendency to stagnate. On this journey, the Israeli security establishment can learn from industry, despite major differences between the two sectors, how transformation can be incorporated into an organization.⁶⁷

■ **FREE FLOW OF IDEAS.** The security community as a whole, and its various components, should develop a culture and climate that facilitates the horizontal as well as vertical free flow of ideas, allows and incentivizes risk taking through experimentation and by accepting failure, and encourages nonconformity, pluralism, and self-criticism. Professional echelons should freely suggest transformational institutional and policy approaches to the political echelons, while a better-educated political echelon should be empowered to demand and champion transformational approaches within the professional echelons.

■ **LEADERSHIP.** As with many other aspects in this strategic and organizational vision, success can only emerge from a leadership that, instead of smoothing over conflicts and discrepancies, challenges the lower echelons to address the painful realities flowing from current conditions and mobilizes them to embrace new approaches, behaviors, and ways of operation.⁶⁸

Israel is facing a reality in which values and beliefs that previously set the basis for success are no longer relevant; in which the old ready-made solutions are ineffective for addressing new problems. Given this reality, the leadership

is responsible for breaking existing patterns and asking the right questions that can lead to transformation. The tendency of senior security officials to provide certainty and confidence and to focus on practical short-term technical issues can, in turn, be counterproductive given the larger need to reflect deeply and spark radical change within the organization.

Further, the leadership should be responsible not only for stimulating change but also, given the vast shifts in Israel's security landscape, regulating its pace while tolerating uncertainties and maintaining the right level of organizational dissatisfaction, thereby encouraging transformation rather than paralysis. Doing so requires real setting of priorities and distinctions between short- and long-term planning.

The security budget represents another item to be reconceived. What is today in Israel called the "security budget" actually means the Ministry of Defense budget, and no real discussion exists about how to properly use all the means of *all* the ministries and other state institutions toward promoting greater national security. The military, as emphasized elsewhere in this paper, is only one of six instruments of national power.

Force design programs, finally, should meet three main standards. These standards should

- encompass all six elements of national power and reflect a new and relevant balance among them;
- be based on a clear vision regarding the nature of future strategic competition, future wars, and emerging threats and opportunities, rather than a technical budgeting process; and
- reflect a new balance whereby internal perceptions and programs are constantly reexamined and readjusted to meet external realities.

DESIGNING THE TRANSFORMATION PROCESS

Creating an effective process for transformation requires establishing a learning- and action-oriented space for discussion on matters stretching from policy objectives to procedures for implementation. This paper suggests a two-layer process, the first focusing on ends—i.e., national security objectives—the second on ways and means. Obviously, constant communication and interaction must exist between the two layers.

THE ENDS LAYER. The literature suggests three preconditions for the design of a good strategy that clarifies achievable ends while keeping an eye open to exploring new ways and means:⁶⁹ active involvement of the political echelon, participation of the appropriate top officials from the entire security establishment (with “appropriate” meaning that they can contribute to the exploration and also deliver by directing their organizations), and time. Practically speaking, the “design group” should be relatively small, including several cabinet members and about a dozen national security officials.

THE WAYS-MEANS LAYER. In many cases, national security officials may not look to overturn existing models, which are familiar even if obsolete, but instead pursue new and more efficient ways to accomplish the same strategy. In order to create a more fruitful environment for exploration, an interagency group consisting of the IDF, MFA, Ministry of Defense, Mossad, and others should be assembled to discuss ends, ways, and means according to structures and tasks, with the goal of efficiently promoting national security objectives using the six lines of effort mentioned throughout.

TRANSFORMING STOVEPIPED BUREAUCRACIES

Recent developments in technology, society, politics, and organizations have spurred a governance trend favoring a more horizontal and networked constellation of public-sector bureaucracies, private-sector corporations, and NGOs. These entities collect information, enhance decisionmaking, and improve execution in both the national and international arenas. Today, this model is perceived to be more effective than the orthodox vertical and stove-piped structure of traditional bureaucracies.

This modus operandi, although complex and necessarily slow to emerge, can allow for greater cooperation, flexibility, and innovation, while also compensating for the growing scarcity of means. Governments that consciously choose to implement policy by creating and encouraging networks,⁷⁰ or networked governments, contract out governmental tasks to entities with comparatively better reputations. For their part, these agencies or organizations are willing to enter risky markets that they would never have entered without government direction, support, and funding.

The Israeli security establishment, like other security establishments, is built according to the industrial model of stovepiped bureaucracies designed

to fight conventional, industrial wars. Nevertheless, in the national security domain, government by network has relative advantages in situations where the outcomes of governmental policies are too amorphous and hard to measure in traditional public-sector bureaucratic terms. Open-source intelligence collection, homeland security, and soft power campaigns can be easily implemented by creating networks based on public-private partnerships.

Israel's size, informality, and diaspora offer good starting points to adopt a more integrative, networked approach to national security. To shift to a collaborative culture, the Israeli security establishment must overcome its unilateralist leaning, which is manifested in three main tendencies: exclusion and marginalization of peer agencies, disregard of non-security-establishment entities, and a short-term transactional approach to relationship building.

Government by network applies mostly to the national arena, but the same idea pertains internationally, where the common terms are military cooperation, security relations, and coalitions. Cooperation and coalitions can provide Israel with two essential needs: increased legitimacy and expanded capability.

A FINAL WORD

Strategies are organizationally contingent. Israel needs to develop adequate strategies to fit the emerging realities of both the region and the larger international arena. In order to succeed in this endeavor, Israel must transform its security establishment.

This paper has sought to diagnose the drift between the current organizational reality within the Israeli security establishment and the external environment in which the security establishment operates to promote national security goals.

This paper also proposes a broad course of action, a certain method to narrow the gap, improve performance, and increase the effectiveness of the Israeli security establishment. This is not an easy task, and it involves the painful giving up of old habits, proven past procedures, concepts, and missions.

Finally, this paper argues that the proposed strategy has a key role in this huge undertaking. Since the current strategy is part of the problem, only an updated approach to strategy and the security apparatus that implements it, as well as a new strategy itself, can help Israel successfully confront the security challenges it now faces and will face in the coming years.

The *Odyssey*, mentioned at the beginning of this paper, famously tells of Odysseus's journey home to Ithaca. In this mythic story, Homer praises the

superiority of guile over brute force in devising strategy. The Israeli journey toward a peaceful existence continues. In the journey's next chapter, Israel must innovatively transform its security apparatus to exploit its sources of national power and implement a strategy of guile, as described throughout this paper. Transforming the IDF, gaining strategic competence, and conducting collaborative political-military learning are all essential conditions for the required shift.

NOTES

1. This term refers here to every official with some sort of authority or responsibility to deal with national security issues—broadly defined to include nonmilitary aspects of national security. It encompasses the political echelon as a whole, and specifically the government, defense cabinet, and parliamentary committees for foreign affairs and security. At the professional level, it includes the Ministry of Defense, Israel Defense Forces, Ministry of Foreign Affairs, Ministry of Finance, National Security Council, Israel Security Agency, Mossad, and some additional executive branch segments directly involved in these issues. One intentional goal for this paper is to expand the common understanding of the term “defense establishment.”
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20. "Trends & Markets," European Travel Commission, <http://www.etc-corporate.org/>.
21. Audrey Kurth Cronin, "Cyber-Mobilization: The New Levée en Masse," *Parameters* 36, no. 2 (2006): 77, http://spgia.gmu.edu/wp-content/uploads/PDFs/Audrey_Kurth_Cronin/cybermobilization.pdf.
22. The U.S. corollary to this problem was expressed well in the U.S. Joint Forces Command, Joint Operating Environment (JOE) (U.S. Joint Forces Command, 2010): "American confidence in the technical aspects of war has led to less emphasis on the political foundations of war, in planning for a viable political end-state, and in matching national means to this end-state. *The implications of this foreign perception will be adversaries that are more willing and able to fight in the cultural and political domains.* Adversary strategic and operational design will attempt to balance regional requirements to engage or even dominate neighbors, while simultaneously recognizing the need to shape U.S. perception and engagement, while preparing for conflict with U.S. forces" (p. 67).
23. Andrew Mack, "Why Big Nations Lose Small Wars: The Politics of Asymmetric Conflict," *World Politics* 27, no. 2 (January 1975): pp. 175–200, <http://web.stanford.edu/class/polisci211z/2.2/Mack%20WP%201975%20Asymm%20Conf.pdf>.
24. Frank G. Hoffman, *Conflict in the 21st Century: The Rise of Hybrid War* (Arlington, VA: Potomac Institute for Policy Studies, 2007), pp. 9, 43–54, http://www.potomacinstitute.org/images/stories/publications/potomac_hybrid_war_0108.pdf.
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27. Including Lebanon, Israel, Cyprus, and Egypt.
28. For an analysis of the Israeli interpretation of deterrence, see Dima Adamsky and Yossi Baidatz in *Eshtonot* 8 (October 2014) (Hebrew).
29. See Thomas Mahnken, ed., *Competitive Strategies for the 21st Century: Theory, History, and Practice* (Stanford, CA: Stanford University Press, 2012).
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31. Referring to a field of knowledge developed by the U.S. Department of Defense, mostly during the 1970s, within the Cold War context.
32. Richard K. Betts, “Is Strategy an Illusion?” *International Security* 25, no. 2 (2000): pp. 5–50, <http://belfercenter.ksg.harvard.edu/files/betts%2025.2.pdf>.
33. Ibid.
34. Horst W. J. Rittel and Melvin M. Webber, “Dilemmas in a General Theory of Planning,” *Policy Sciences* 4, no. 2 (1973): 155–69.
35. Daniel Kahneman, *Thinking, Fast and Slow* (New York: Macmillan, 2011).
36. This part is based on Thomas Mahnken, ed., *Competitive Strategies for the 21st Century: Theory, History, and Practice* (Stanford, CA: Stanford University Press, 2012).
37. It is important to note the difficulty of applying the competitive strategies approach to small nonstate actors, because they do not have longstanding bureaucratic structures.
38. Operational art was recognized by the Soviets after World War I in order to scientifically answer three metaquestions with regard to war under the political, social, and technological conditions created after the Industrial Revolution: what went wrong in World War I, how to bridge the gap between strategy and tactics in industrial warfare, and what is the scientific answer to planning and conducting a war given these preconditions. Since then, and especially during the last twenty years, operational art has been adopted, localized, and institutionalized in Western military organizations, although not without vigorous debate over its use and importance. For further reading, see, for example, Shimon Naveh, *In Pursuit of Military Excellence: The Evolution of Operational Theory* (New York: Routledge, 2013), Justin Kelly, Mike Brennan, and Huba W. Wass de Czege, “Systemic Operational Design: Learning and Adapting in Complex Missions,” *Military Review* (January/February 2009), <http://connection.ebscohost.com/c/articles/37223082/systemic-operational-design-learning-adapting-complex-missions>.
39. Barry D. Watts, *U.S. Combat Training, Operational Art, and Strategic Competence: Problems and Opportunities* (Washington DC: Center for Strategic and Budgetary Assessments, 2008), <http://www.isn.ethz.ch/Digital-Library/Publications/Detail/?ots591=0c54e3b3-1e9c-be1e-2c24-a6a8c7060233&lng=en&id=162562>.
40. Ibid.
41. Justin Kelly and Mike Brennan, *Alien: How Operational Art Devoured Strategy* (Carlisle, PA: Strategic Studies Institute, 2009), <http://www.strategicstudiesinstitute.army.mil/pubs/display.cfm?pubID=939>.
42. Eliot A. Cohen, *Supreme Command: Soldiers, Statesmen, and Leadership in Wartime* (New York: Simon & Schuster, 2012).
43. For example, the postwar operation in Lebanon or Gaza—referred to in U.S.

military terminology as Phases 4 and 5 of a campaign—are, practically speaking, coalition stabilization operations. According to this perspective, even if Phase 3 (i.e., the military operation) remains a unilateral Israeli operation, the prewar operations (Phases 0, 1, and 2) can be multilateral ones.

44. Military objectives cannot be the glue that holds together a coalition; the political objective must serve this role. Since cooperation is a political instrument, sometimes military effectiveness must be compromised in order to reap the benefits associated with political cooperation.
45. Gregory J. Dyckman, *Security Cooperation: A Key to the Challenges of the 21st Century* (Carlisle, PA: U.S. Army War College, 2007), <http://www.strategicstudies-institute.army.mil/pubs/display.cfm?pubID=820>.
46. *Ibid.*, p. 110.
47. This paper relies on already-acquired skills, procedures, and tactics, techniques, and procedures (TTPs).
48. Adam N. Stulberg, Michael D. Salomone, and Austin G. Long, *Managing Defense Transformation: Agency, Culture and Service Change* (Ashgate Publishing, 2013): 181.
49. The following literature overview is based on the following studies: Adam N. Stulberg, Michael D. Salomone, and Austin G. Long, *Managing Defense Transformation: Agency, Culture and Service Change* (Ashgate Publishing, 2013); Richard Hundley, *Past Revolutions, Future Transformations: What Can the History of Revolutions in Military Affairs Tell Us about Transforming the U.S. Military?* (Santa Monica, CA: RAND Corporation, 1999), http://www.rand.org/pubs/monograph_reports/MR1029.html.
50. Richard Hundley, *Past Revolutions, Future Transformations: What Can the History of Revolutions in Military Affairs Tell Us about Transforming the U.S. Military?* (Santa Monica, CA: RAND Corporation, 1999), pp. 7–20, http://www.rand.org/pubs/monograph_reports/MR1029.html.
51. Adam N. Stulberg, Michael D. Salomone, and Austin G. Long, *Managing Defense Transformation: Agency, Culture and Service Change* (Ashgate Publishing, 2013), pp. 18–19.
52. Military transformation literature examines many case studies from various eras of military history. A few such case studies from the previous century cover: the development of operational art in the post–World War I Soviet military; the successful U.S. innovation of naval carrier warfare; the German Blitzkrieg; the British interwar failure to equip its army and navy with tanks and carriers; the influence of the nuclear bomb and missile technology on the U.S. military; the U.S. Army's failure to transform to meet counterinsurgency challenges after the Vietnam War; and the U.S. military's limited success in transforming according to the early 2000s “system of system” concept.

53. Ibid., pp. 20–21.
54. Ibid., pp. 21–50.
55. James Russell, *Innovation, Transformation, and War: Counterinsurgency Operations in Anbar and Ninewa Provinces, Iraq, 2005–2007* (Stanford, CA: Stanford University Press, 2010).
56. Ibid., p. 52.
57. Ibid., p. 10.
58. Williamson Murray, *Transformation and Innovation: The Lessons of the 1920s and 1930s*, IDA Paper P-3799 (Alexandria, VA: Institute for Defense Analysis, 2002).
59. Adam N. Stulberg, Michael D. Salomone, and Austin G. Long, *Managing Defense Transformation: Agency, Culture and Service Change* (Ashgate Publishing, 2013), pp. 21–25.
60. Refers to either a person or a subunit.
61. Adam N. Stulberg, Michael D. Salomone, and Austin G. Long, *Managing Defense Transformation: Agency, Culture and Service Change* (Ashgate Publishing, 2013), p. 38.
62. Ibid., pp. 41–42.
63. Eran Ortal, ed., *Bein Haktavim 2* (Dado Center for Interdisciplinary Military Studies, July 2014), <http://maarachot.idf.il/72255-he/Maarachot.aspx>.
64. This article is the most systematic unclassified account of the current DMI transformation.
65. The word *aman* is the Hebrew acronym for DMI, but it also means “craftsmanship.” Thus the wordplay in the fully translated title, “A Work of Craftsmanship.”
66. Peter M. Senge, “The Fifth Discipline,” *Measuring Business Excellence* 1, no. 3 (1997): pp. 46–51.
67. For example, agencies can create the position of chief transformation officer to encourage internal transformation, and the security establishment as a whole can create a network to ensure that change has a system-wide impact.
68. Based on Ronald Abadian Heifetz and Donald L. Laurie, “The Work of Leadership,” *Harvard Business Review* 75 (1997): pp. 124–34.
69. Barry D. Watts, *U.S. Combat Training, Operational Art, and Strategic Competence: Problems and Opportunities* (Washington DC: Center for Strategic and Budgetary Assessments, 2008), pp. 67–74, <http://www.isn.ethz.ch/Digital-Library/Publications/Detail/?ots591=0c54e3b3-1e9c-be1e-2c24-a6a8c7060233&lng=en&id=162562>.
70. Elaine C. Kamarck, *The End of Government as We Know It: Making Public Policy Work* (Boulder, CO: Lynne Rienner, 2007).

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