In Search of the ‘X’ Factor: Morale and the Study of Strategy

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* Concept of military morale remains ill defined, inconsistently used and poorly understood.
* It has explanatory value in combat if it focuses its meaning on motivation and the willingness to act in a manner required by an authority (while not excluding the role of mood or group cohesion).
* Multi-dimensional model of morale
* Morale can be understood as emerging from the interrelationships of the factors which affect military means. This perspective allows the interaction between morale and policy to be explored in a manner that facilitates insight into the art of war (strategy).
* Measure it with case study of Northern Campaign of WW2

**Definitions of Morale**:

* Extent to which an individual’s needs are satisfied and the extent to which the individual perceives that satisfaction as stemming from his total job situation (Guion, 1958, 802).
* 3 definitions of Gal and Manning, 1987 as cited in 802
  1. Confidence in one’s self, team, weapon or commanders.
  2. Perceived group cohesion.
  3. Sense of contribution or commitment.
* 3 broad approaches to morale (Stephan Motowidlo et al., 1976, as cited in 803

1. Motivation (goals, determination, persistence, tenacity, progress)
2. Satisfaction (cheerfulness, contentment, freedom from worry, satisfaction of physical needs for food, water, rest etc.)
3. Group Cohesiveness (solidarity, cooperation, self-sacrifice for the group, esprit de corps, traditions).

* Thomas Britt and James Dickinson, 2006
  + Level of motivation and enthusiasm for accomplishing mission objectives.
* **Broad approaches to morale:** 803
  + as an affective state (psychological orientations that are an expression of or dependent on emotions or feelings).
  + as an aspect of group dynamics and,
  + as motivation.

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| --- | --- | --- | --- |
|  | Guion,1958 | Gal and Manning,1987 | Motowidlo et al, 1976 |
| Affective State | Satisfaction (job rel) | Confidence  Sense of commitment | Satisfaction |
| Group dynamics | Cohesiveness Acceptance of goals | Group cohesion | Group cohesion |
| Motivation |  |  | Motivation |

Table 1. Broad Approaches to the Definition of Military Morale (Fennell, 2014, p. 804)

* Definitions of morale does not stay in one boundry and combine different ideas related to morale. 803
  + an affective, motivaltional, and aspect of group dynamics (Manning)
  + affective state and motivation (Britt and Dickinson)
* Risks in defining morale as affective state or group dynamics. Especially when relationship between morale and military performance considered. 803
  + General acceptance: strong relationship between high levels of morale and positive military performance.
  + However, ind may have positive affective states in contrary to the org. or vice versa804
    - Soldier feel satisfied on run away but this is bad for army,
    - Fight with great determination while being personally quite miserable.
    - Strong group bonds undermine positive military performance. Soldier stops to aid a wounded comrade in spite of orders to press the attack.
    - Seeing war as pointless might see its commanders as the real enemies,
    - Group desertions and mutiny can evidence small group cohesion, but contrary to the military institution. Lynn, 1996, as cited in Fennel
    - In Vietnam, the importance of group survival often outweighed the need to complete assigned tasks.Wesbrook, 1980
    - Reductive suggestion: morale can only exist in the context of a group. Individual morale is influenced by multi-dimensional factors that go far beyond simple group dynamics (see Figure 1).

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* Morale as affective states or group dynamics are unhelpful in military context.
* Link morale with motivation: Motivation does not require the ind or group to be enthusiastic (Britt and Dickinson) about assigned objectives.
  + Combatants can be motivated for tasks that they do not want to engage with, that they are not hopeful or confident because they are coerced into action. 805
  + ‘Kill or be killed’: logic of battle; stay and kill or being killed by the enemy or by your own provost-marshal. coercive dynamic in warfare, John Keegan, 1997
  + In inculcation of morale, discipline is an indispensable factor. McPherson, 1950
* Military professionals link morale more with motivation and distance with affective or group.
  + Field-Marshal Viscount Montgomery, 1946 (heart of the concept of military morale)
    - Endurance and courage in supporting fatigue and danger … the quality which makes men go forward in an attack and hold their ground in defence’. 806
    - Morale is not about satisfaction or happiness. Happiness may be contributory factor in the maintenance of morale over a long period. A man can be unhappy but can still without complaining, advance and defend’.
    - Group dynamics in very much the same. Morale is like an overall causative influence on a soldier's conduct.
  + Definition based on Monty: Willingness (engendered by a positive desire for action and/or by the discipline to accept orders) of an individual or group to engage in an action required by an authority.
    - Links morale with positive military performance
    - Makes sense of the emphasis that military organisations place on morale.
    - Does not conflate morale with mood or group dynamics (while not excluding the benefit of positive emotions or group cohesion).
    - Military require personnel foremost to be willing to carry out orders.
    - If troops willing to carry out orders, military will have a chance of success irrespective of the personal mood or the cohesiveness of their groups.

**Influences or determinants’ of high and low morale** 807

* Explanations for combat morale (what maintains it) and motivation:
  + Primary group theory(dominant): men fight not for a higher cause but for their “mates”, bound by war in a relationship which … can achieve great intensity’. Strachan, 1996, 1997
  + Ideology or ‘cause’.
    - Military factors alone not suffice to explain combat motivation. Strachan, 1997
    - The ways and ideals of the combatants, rather than purely internal military logic, often better explain how war is fought. Lendon2005
    - Marshall, 1966 defines morale as the thinking of an army. The way it feels about;
      * soil and people from which it springs,
      * cause and politics,
      * friends and allies, enemies, commanders, comrades, weapons,
      * needs,
      * conceptions (militarism and civilianism, freedom and slavery, discipline and disorder, life and death, god and the devil).40
* Motivation of combat behaviour was so complex (hoped that few major factors have been entirely neglected). Stouffer et al., 1965. Problems of this view:
  + Morale seen as ‘so pervasive’ to scientificly analyze.
  + Morale heuristically useful and too internally complex to be empirically workable’. Motowidlo et al., 1976
* Some studies focused on reductive explanations for what causes and maintains combatant morale. This is the case in literature on primary **group cohesion**.43
  + Cohesion, like morale, can be defined in many ways, it is generally agreed that the essence of cohesion ‘is trust among group members, together with the capacity for teamwork.44
  + Studies on group dynamics in combat:
    - it has explored the intricate web of interrelationships between the group and the other factors that influence morale and combat performance.
    - But, it has conflated a complex issue into an oversimplified construct that seeks to function as a catch all explanation for battle morale and combat effectiveness.
    - Marshal and Stouffer et al. point, an amalgam of influences driving morale, only one of which is group cohesion.
* A comprehensive analysis of the factors as influences on morale is important.
  + **endogenous** (factors primarily within the military organisation) or
    - institutional factors: under the control of a military organisation and may include, but are not restricted to, dynamics such as command, discipline, selection of personnel, doctrine, welfare and education, ethos and duty, training, efficient organisation and supply.
    - Social factors such as leadership, cohesion (primary group) and esprit (secondary group) are also important. Individual factors such as a person’s disposition, background, coping strategies, relationship with home, experience and levels of fear, confidence, fatigue and rest cannot be discounted either
  + **exogenous** (factors primarily outside of the military organisation).
    - Important in inculcating morale. Characterised as the ‘cultural’ study of war by Lendon, 2005
    - Ideas and ideals which press upon men, causing them to accept a discipline and to hold to the line even though death may be at hand.Marshall, 1966
    - Categorised
      * political (propaganda, aims, ideology and the size of force),
      * economic (amount and quality of weapons tech and equipment),
      * cultural (basic military law/rules of engagement, values/ethics and view of the enemy),
      * environmental (type of terrain and climate) and,
      * situational (amount and quality of information, rumours, friction and situational antecedents such as recent successes or failures in battle).
* This is not an attempt to list all factors that can influence morale. Main antecedents of good and bad morale.
  + Simple: it does not engage with the manner in which the individual or group interrelates with these dynamics.
  + It does not create a hierarchy of influences or insert intervening variables between the ‘independent’ and the ‘dependent’ ones (morale).
  + factors interrelate in a different manner in each war, the nature of morale and the factors that influence it are broadly unchanging.
  + catch-all or reductive explanations is to be abstained to understand the complex array of issues that influence a soldier’s willingness to fight.

Morale and Strategy, 810

* Few studies on the individual’s combat motivation, the morale of a unit or formation, and the strategy. Histories are founded upon vague assumptions and narratives on military performance and outcomes in war and they did not elaborate the underpinning of their analysis. Lynn, 1996
* War is an act of force to compel our enemy to do our will, Clausewitz. Suggests, belligerents fight for an end. This end is driven by reason, passion and hatred or pure chance. Challenge of devising a successful strategy to achieve a goal dominates military theory and practice. Strategy was the central and unifying theme of Clausewitz’s On War. Strachan, 2007.
* Definition of Strategy
  + Clausewitz: use of the engagement for the purpose of the war.
  + Gray, 1999: the use that is made of force and the threat of force for the ends of policy
  + Hart, 1967: the art of distributing and applying military means to fulfill the ends of policy.
* Relationship between military means and policy ends is at the heart of the strategic process.Strachan, 2010. Military decision-makers have constantly to align their means to coincide with policy; vice versa, policy-makers have to create policy in line with the available means. iterative strategy process. A dialogue where ends reflect means, and where the result is a compromise between the ends of policy and the military means available to implement it. Strachan, 2005.
* Achieving policy ends by use of violent means, one has to match effort against enemy’s **‘power of resistance’**. It is product of two inseparable factors, the total means (measurable) and the strength of his will (less easy to determine and can only be gauged approximately by the strength of the motive animating it). Clausewitz, 1976.
* Military means are a product of the interplay between the material (physical and conceptual of BDD) capability to fight and the will to fight or morale (moral factor of BDD).
* When an enemy can no longer continue to fight (either material and willing to fight strength ends) because of strategic process, alter policy (ends must reflect means). Victory ensues when a belligerent no longer has the means to resist the will of the enemy and alters policy (surrender or ceasefire).
* The military means to obtain endes were divided by Clausewitz and his successors into two: Howard, 1999
  + strategy of annihilation – the destruction of the enemy capacity to defend himself by destroying his armed forces on the battlefield; The first disarms the adversary, leaving him literally at the mercy of the victor.
  + use of attrition to wear down his will to resist. persuades him that victory is obtainable at an unacceptable price.
* Thus, the relationship between morale, military means, strategy and policy can be diagrammatically set forth as follows:

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* Military outcomes rarely require the complete destruction of the material means of enemy.
  + prevalence of the loss of the ‘enemy’s will’ in deciding military outcomes. Gray, 1999.
  + conflicts are decided often losing the will to fight and changes policy. Howard, 1999
* This relationship true for other military conflicts and all levels of war.
  + irregular war is not only a contest of military and economic power, but also a contest of human power and morale Mao Tse-tung, 1963
  + irregular wars are in nature exactly the same as conventional ones. Felming 2009, Shuurman, 2010
  + in conventional war, affecting morale by attacking many of the endogenous factors (destruction of the enemy’s forces or through superior tactical deployments).
  + in insurgency (irregular war-war amongst the people): influence the antecedents of morale differ.
    - more difficult. insurgents do not mass in a definable battle space; wear identifiable uniforms and they blend into the civilian population.
    - can influence morale by accessing other antecedents of the will to fight. These can include exogenous factors such as developing the local economy, delivering accessible and quality education and fostering more accountable and efficient government.Nagl, 2005
* insurgents too must strategise and align ends with means- west experience in Afg and Iraq. Fleming 2009, Shuurman, 2010
* destroying the material capability of an insurgency difficult, as US discovered in Vietnam. Instead, ‘hearts and minds’ approaches adopted with aim to influence and alter the people’s, and therefore the insurgents’, will to fight.
  + by targeting means and morale of the enemy, west attempt to influence strategy and policy.
  + terrorists and guerillas aimed at an opponent’s will to fight rather that his means, now they enjoy enhanced access to that will.’ Echevarria , Shuurman, 2010
  + the centrality of morale in counter-insurgency context become evident.
* The primacy of morale in strategy valid even in nuclear conflict.
  + missiles may function good. But humans willing to dispatch them? The brutal arithmetic of combat is important, but it does not tell the whole story. Many factors contribute to fighting power, but central importance is the willingness of people to fight.Gray, 2010
* Basis of Cold War strategy, the doctrines of deterrence and mutually assured destruction, were built on this understanding. The US and the Soviet has nuclear weapons. However, neither could destroy in a first strike the total material (nuclear) means at the disposal of the enemy. Instead, by guaranteeing a second strike capability, both sides targeted the willingness of the enemy to fight and employ their nuclear arsenals. In an environment where technology appeared paramount, it was, in fact, considerations related to morale that significantly influenced strategy, and, therefore, policy.

**Assessment of Morale** 814-816

* So, morale plays a crucial role in the strategic process. However, morale definition and its relationship to policy means little if morale is not assessed or ‘measured’. Meaningful use of it in devising strategy depends measurement. ‘the assessment of the enemy’s will is problematic. danger is to focus on that which can be measured rather than on the critical but more elusive factor of will.’Handel, 2001
* **methods** of assessing morale: although rare, invaluable studies
  + standard: to rely on individuals’ reported levels of morale.
  + use of attitudinal surveys on the German and American armies in World War II. Shils and Morris, 1948; Stouffer et al., 1965; Marshall, 1966;
  + surveys on combat motivation in the 2003 Iraq War. Leonard Wong et al.,2003.
  + Historians rely on personal accounts, letters and diaries.
  + use of official sources, reports and censorship summaries. cover morale widely
    - Alexander Watson’s *Enduring the Great War* and
    - Fennel’s *Combat and Morale in the North African Campaign*.
  + NA WO 193/453 Assessment of Morale by Statistical Methods
    - Some factors are outcomes or correlates of morale; rates of desertion, sickness, surrender and psychological breakdown among troops fall into this category. amenable to quantitative analysis
    - Others are influencers or determinants of morale; the whole range of endogenous and exogenous influence on morale (Figure 1).
  + qualitative procedures: examination and interpretation of recorded perceptions of individuals can also be examined.
  + integration of quan and qual analyses of the morale factors gives detailed picture.
  + comparsion with known battlefield performance, allows development of a clear relationship between morale, strategy and military outcomes.

**Morale and Strategy: A Case Study**

* ideas in employment in case. Theory is developed so that practitioners need not start afresh each time a new challenge arises. Theory – give insight - leave into action. Clausewitz
* theory set the link morale and strategy in war. history gives examples of the centrality of morale in the strategic process. The case of 8th Army in the North African campaign of WW2 instructive.
* The defeats suffered by Eighth Army at Gazala and Tobruk, in May and June 1942, and the stalemate on the El Alamein line, in July 1942
  + influenced by a morale crisis that reached a peak in August 1942.
  + manifested in lack of enthusiasm, failure in group dynamics, but more in general lack of willingness to act.
  + factors on morale were deficient; was averagely led, inadequately trained, poorly equipped, uncertain of the cause for and deprived of the effective support of families back home and sustainable primary groups. Fennell, 2011, chapter 8. negative impact on the material means and on the morale.
  + Qualitative assessments of morale, censorship summaries: lack of willingness to engage the enemy; little or no traces of the offensive spirit, and an absence of any reference to forcing the enemy to give up the ground.Archieves New Zeland, 5-11 Aug 1942
  + Eighth Army’s measurable outcomes of poor morale suggest that morale was indeed at an all time low.
    - % 73 increase in sickness between March and August 1942.National Archieve.
    - battle exhaustion cases caused;
      * July-%7 - 10 of the total sick and battle casualties. NA WO 177/324 Memo
      * July-% 26 of South African battle casualties. NA WO 177/324 Monthly Statistical Report on Health of Eighth Army
      * August-% 28 of New Zealand battle casualties. ANZ WAII/8/Part 2/BBB Freyberg Papers
    - average monthly desertions increased tenfold from the Feb/June period to the June/July period;Fennell, 2013
    - the situation was serious, in July 1942, commanders sought the reintroduction of the death penalty. (backed by data of % 88 of casualties during the summer fighting could be classified as missing or having surrendered. NA WO 163/89).
* The morale crisis significantly influenced strategy in North Africa. Commanders, cognisant that their men were demonstrating behaviours associated with poor morale, had to engage in the strategic process and change goals. Initially this meant a retreat to the El Alamein line, later it led to the cancellation of offensive operations on the El Alamein line in July 1942.Fennell, 2011, chapter 7
* Auchinleck admitted, that perhaps he had ‘asked too much of [the troops]’.Liddle Hart Centre for Military Archieve,, 1942. Goals and means had clearly become unbalanced.
* Change of commanders, Montgomery appointed Commander of 8th Army. they focus on improving the means, setting achievable goals. efforts to improve morale factors: Fennell, 2011, Chapter 5,6,7.
  + Monty built his command style around the need to foster the will to fight,
  + levels of training and equipment improved,
  + link of soldier with his homeland improved,
  + causes were implemented,
  + education and welfare initiatives,
  + mixing policy of units abandoned to facilitate the coherence of primary groups and esprit de corps.
* Monty set limited-in line with means- objectives at the Battle of Alam Halfa in September 1942 and gave defensive battle. Limited victory enabled to regain its morale among troops.
* 8th Army experienced a turn after that battle. Argument: this turnaround is driven by purposeful efforts of strategy to take account of and improve the morale of the troops. Improvements were not on a reductive understanding of morale, but, on a nuanced appreciation of the almost infinite complexity of human needs and motivations.
  + censorship summary for Oct- Nov 1942: ‘morale displayed in correspondence from forward … troops’ had ‘never reached a higher level’.AWM, 1942
  + battle exhaustion of fighting at El Alamein was low, especially for an attritional infantry battle.Shephard, 2004
  + exhaustion for Oct and Nov 1942 was 209 during the offensive than July battles alone had been 557. statistical reports, NA WO, 1942
  + 2nd New Zealand Division suffered only 57 instances of battle exhaustion at El Alamein. ratio of 1 to 100 battle casualties, the lowest NZ ratio of the war.ANZ WAII
  + South Africans suffered a rate of 2 exhaustion cases per 100 battle casualties. During the summer battles 26 cases per 100 battle casualties.NA WO, 1942
  + by November, the monthly sick admission rate was 47.7 per thousand, a 33 per cent drop from a monthly rate of 75 per thousand in August. The incidence of surrender and desertion also dramatically decreased. At El Alamein, those who were missing or captured made up only 17 per cent of casualties.
* Argument: This morale turnaround influenced British goals at the Battle of El Alamein. The German and Italian Panzerarmee stayed in defence. By the end of the battle ‘Eighth Army run out of infantry units. Barr, 2005
  + Many of the front-line battalions of Eighth Army suffered over 50 per cent casualties.Fennell, 2011
  + Nevertheless, Monty continued his offensive policy focused on the gradual attrition of the enemy forces. He believed that battles were ‘won primarily in the hearts of men’Monty, 1958
  + Monty objectives in line with his men will to fight.
* Factors of morale also influenced German strategy. 8th Army outnumbered the Panzerarmee in terms of material means during the critical months of fighting that led to victory at El Alamein in November 1942. This inferiority was exacerbated by insurmountable logistic systems. Between January and August 1942 the Panzerarmee had to make do with only 40 per cent of the supplies it needed. Kitchen, 2009
  + El Alamein as a battle of ‘materiel, in which tactical skill, courage and morale were no longer significant. It was a war that the Axis could not possibly win.’ General Warlimont, 1965, Kitchen, 2009
  + Challenge:
    - 8th Army had materiel advantages at Gazala and during the July battles, and had been beaten.
    - Recent scholarship has also provided evidence to suggest that there is a weak correlation between materiel advantages and success in war.Biddle, 2005
    - The best equipped military machine will have little success if an army is unwilling to fight. The evidence from El Alamein, without a doubt, suggests that materiel was important, but, not solely in the manner that Warlimont and Kitchen imply.
* The ‘Lessons from Operations’ derived from the Battle of El Alamein reported that ‘considering the density of the artillery support during the various attacks, the number of enemy dead and wounded found by the leading troops was surprisingly light, and that enemy automatic weapons quickly opened up when the barrage or concentration … passed.’
* The report stressed that the killing power of artillery barrages or concentrations against well dug-in infantry is often slight. The purpose of the artillery support in an attack is primarily to shake the enemy’s morale, temporarily to stupefy him … ‘to enable the attacker to reach the objective with the minimum of casualties. The killing or capture of the enemy then follows.’96 Reports and accounts written later and after the war tended to lend support to this conclusion.97 One such report found that the morale effects of bombardments were anywhere between two to six times greater than the material effects.98
* By the closing stages of El Alamein the German war diaries reported that their troops were ‘exhausted’ and that, taking all things into consideration, ‘it had to be admitted that after a desperate 10-day struggle against an enemy superior on land and in the air the Army was in no condition to prevent a further attempt at breaking through.’99 Ends would have to be altered to take account of the material and morale means available. The war diaries identified four reasons why further resistance would fail and plans had to be altered. The first was ‘the enemy’s great superiority in tanks and artillery’. However Eighth Army’s armoured units had proved largely ineffective at El Alamein and it is arguable that the artillery did more morale than material damage to the Axis forces.100 The second reason was ‘the continual heavy day and night bombing attacks, against which there was no defence’ and which ‘only added to the feeling of inferiority’ suffered by the troops of the Panzerarmee. However, air bombardment was notoriously inaccurate101 and was seen by both sides largely as a morale weapon rather than a material one.102 The third reason was the ‘almost complete failure of the Italian troops’. According to the report of the General Officer Commanding Afrika Korps, the Axis problem lay once again with the morale of the Italian formations. The fourth and final reason was the Panzerarmee’s ‘own heavy losses in men and materiel on account of the enemy’s vast superiority in the most modern weapons’. There can be no doubt that the weight of fire unleashed on the Panzerarmee caused destruction and casualties. However, this arguably was not the primary drain on the Panzerarmee’s material and manpower resources. In fact, a large proportion of these casualties can be attributed to morale rather
* than material causes. The statistics show that 40 per cent of German and
* 63 per cent of Italian casualties were missing or POWs; the rate for
* British and Commonwealth troops during the battle was 17 per
* cent.103 In addition, extremely high sickness rates, a sure sign of morale
* problems, removed large numbers of men from the front line.104 Mark
* Harrison has estimated that nearly one in five Germans were listed as
* sick during the battle, with the elite 15th Panzer Division suffering a
* sickness rate as high as 38 per cent.105 Problems with desertion and
* surrender had prompted Field Marshal Erwin Rommel to encourage
* use of the death penalty at courts martial during July;106 these problems
* persisted into October and November.107 Finally, one of the greatest
* effects of heavy losses of any kind is the impact that they have on
* group dynamics, which is generally recognised as a key factor in
* maintaining morale on the front line.108
* In the end, Rommel, when faced with material shortcomings and
* the reality that his German and Italian troops were increasingly demotivated and unwilling to repel the British and Commonwealth
* advance, was forced to alter aims (and retreat) to take account of
* the means available. Morale had played a key role in the strategic
* process for both sides at the Battle of El Alamein. Eighth Army had
* won a brutal ‘killing match’ due to sheer determination and will
* power as much as any other factor. The strategists in the War
* Office, Middle East Command and Eighth Army had successfully
* balanced ends and means in a way that their German opponents
* had clearly failed to do.109

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