Maoist Hybridity? A Comparative Analysis of the Links Between Insurgent Strategic Practice and Tactical Hybridity in Contemporary Non-State Armed Groups

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Abstract

While the recent literature on hybrid warfare has focused overwhelmingly on Russia, military tactical hybridity among non-state actors has received less attention, and minimal comparative examination. This is surprising as the range of non-state actors successfully using hybridized irregular-conventional tactics (increasingly symmetrically) against states has grown.
Exchanging this phenomenon comparatively in three divergent cases (Islamic State, Boko Haram, the Houthi Movement), this article tests an often-overlooked argument stating that military hybridity among non-state actors is a result of these groups’ common adoption of a specific form of Maoist-style warfare strategy – emulative insurgency.

In recent years, many analysts have turned their attention towards the study of hybrid warfare. Definitions and explorations of the concept have proliferated, stretching it far from its original focus on the blurring of irregular and conventional military tactics (and criminality). Most of the recent attention paid to hybrid warfare has focused on the policies of Russia and its alleged hybrid actions in Ukraine (and the West) since 2014. While this focus is understandable, it is a somewhat surprising twist from the point of view of the hybrid warfare literature given that the concept was, until the interventions in Ukraine in 2014, more often applied to violent non-state actors.

Beyond the confrontation with Russia, 2014 also saw a number of highly capable non-state insurgents demonstrating the impact of hybrid irregular/semi-conventional forms of fighting. In June 2014 in Mosul, Iraq, the then leader of the Islamic State (IS), Abu Bakr al Baghdadi declared a “Caliphate” after having routed Iraqi soldiers and police forces from key cities in
the North and West. In August 2014 in Gwoza, north-east Nigeria, Abubakar Shekau, the leader of Boko Haram (BH), declared an extension of the “Caliphate” having ousted Nigerian troops from a series of towns. In September 2014, Houthi rebels in Yemen took over the capital Sana’a (which they still hold) before temporarily reaching Aden. In these campaigns, non-state groups demonstrated hybrid tactical military capabilities, blending irregular and conventional tactics and weaponry in direct warfare against state opponents to seize territory.

Despite the seeming growth in the number of actors engaged in hybrid warfare, and the scale of their actions, the hybrid warfare concept is underdeveloped (especially in relation to non-state actors) and the wider conceptualization of hybrid warfare has been extensively challenged on at least three fronts: Firstly, scholars have argued that concept isastrategic, failing to move beyond the blurring of tactics to explain military hybridity from a strategic perspective. Secondly, the concept has been challenged for being presentist, overemphasizing the novelty of hybrid warfare as a new type of conflict whilst failing to place this war type within an appropriate historical context. Thirdly, as Tuck has suggested, like many concepts in security/strategic studies, hybrid warfare suffers from “generalisations from the specific” with wider observations drawn from single cases, limiting theoretical development.

Despite some excellent accounts of non-state actor hybridity (see for example Hashim, Beccaro, Schroefl and Kaufman, Rauta, and Falode) much of the non-state hybrid literature focuses on the tactical level with limited historical analysis of how hybridity develops within groups and few links to previous historical examples (even if some acknowledge that hybrid war is not new per se). Furthermore, comparative analysis of non-state groups employing hybrid tactics is very rare, meaning few accounts examine hybridity across different conflicts for parallels. This lack of (comparative) attention to non-state hybridity means that a number
of important questions about the phenomenon remain: How is the development of hybridity among non-state actors to be understood strategically? Are there commonalities that account for this type of hybrid military practice across different groups that can give us a broader picture of hybrid practices? If this insurgent practice differs from some conflicts of the recent past, such as the counter-US insurgency in Iraq, is this a new phenomenon?

The answer to these questions, it is suggested here, lies in understanding contemporary non-state hybridity, not as a new war type, but rather as a function of a specific element of Maoist-style military strategy. Indeed, in an often-overlooked piece published by the UK Defence Forum in 2011, Stuart Lyle posited that hybrid warfare was not a novel model of warfare, but rather an intrinsic feature of a phased revolutionary military strategy as espoused by Mao-Tse-Tung and adopted by revolutionary insurgents during the Cold War. Mao advocated a gradual form of insurgency that sees irregular forces develop, through escalating levels of combat, to the point when they would eventually transition to conventional regulars capable of full-scale conventional military operations. From this point of view, hybridity is not a new type of fighting, but rather a feature of the middle-to-late stage on this decades-old strategic process. While some scholars have examined the parallels between contemporary jihadist insurgencies and Maoist practices (e.g. Whiteside, Ryan, Kalyvas and Rich), and a few others (for example Omeni, Hashim) have highlighted links between Mao’s approach to warfare and the question of hybridity, overall, the link between non-state military hybridity and Maoist-style military strategy is currently under-researched (beyond Lyle’s original observations) and comparative examination designed to explain why we see these contemporaneous developments among disparate groups is lacking in the literature.
This article thus aims to pick up where Lyle left off, adopting a comparative most different systems design and employing three process-tracing case studies to highlight the Maoist-style military characteristics of ISIS, Boko Haram and the Houthis and the subsequent generation of hybrid tactics. Through open-source data analysis and semi-structured interviews, it demonstrates how this quasi-Maoist approach leads to increasingly hybrid military tactics over time which, in incorporating semi-conventional operations, offer more symmetrical fighting options and can be employed to seize territory. Drawing on Metz’s notion of emulative insurgency\textsuperscript{14} and Taber’s discussions of Maoist practice\textsuperscript{15} it examines the specific dimensions of Maoist phased \textit{military} strategy that results in hybridity and distinguishes this direct, increasingly symmetrical form of insurgent warfare from the more attritional \textit{malignancy}-style insurgent warfare characteristic of that employed by insurgents against Western forces during the US-led Wars on Terror (which did not, generally, entail much hybridity on the part of militants). Both approaches can exist sequentially or simultaneously (as they did in Communist insurgencies), but only the emulative style stimulates hybrid fighting styles over time. A comparative framework of the type used here places hybrid forms of tactics in a dual historical-comparative perspective (both in the sense of assessing comparatively the historical evolution of specific groups’ use of these tactics and assessing the historical continuities between these groups and the strategic underpinning of past insurgencies). This approach, focused on strategy and spanning continents and decades, in turn helps to address the ‘astrategic’ and ‘presentist’ critiques of the literature on hybrid war.

Developing a better understanding on non-state actor hybridity is important because the hybrid capacities and military successes of Boko Haram, the Houthis and IS appear to challenge some of our more recent understandings of insurgency which, based largely on analyses of recent Western-led wars, especially in Iraq\textsuperscript{16}, are often conceptualised in terms of highly asymmetric,
networked, **malignancy style** \(^{17}\) guerrilla warfare that sees insurgents avoiding direct battle and wearing down opposing forces through irregular, indirect attacks. Metz has argued recently that while many insurgencies are impossible to *eradicate*, “the good news is that networked, swarming insurgencies don’t seem to be able to take over countries the way that some hierarchical 20th-century ones could”. \(^{18}\) Presenting a similar argument based on the insurgency in Iraq, Muckian suggested that “the insurgent of today is not the Maoist of yesterday” \(^{19}\) noting they represented a “constantly shifting network of disparate organizations” with limited central leadership, minimal to no use of large scale guerrilla operations and no desire to control territory. \(^{20}\) Similar arguments have been made by Kilcullen, Hammes and others. \(^{21}\) Indeed, much of the counterinsurgency literature echoes these perspectives at least to the extent of focusing on the asymmetric and networked character of insurgencies \(^{22}\) and assuming state supremacy in terms of military power on the part of the counterinsurgent. However, while this understanding of insurgency captured important aspects of insurgency in the post 9/11 period, the Islamic State, Boko Haram and Houthi insurgencies present a different pattern, exhibiting models of hybrid, semi-conventional fighting that become more symmetrical and more militarily potent overtime, and that are capable of taking over (at least parts of) countries, albeit not always permanently.

To examine these issues, the paper is divided into four sections. The first outlines the methodology. The second considers the notion of tactical hybrid warfare, develops further Lyle’s conceptualization of a link between hybridity and Maoist-style revolutionary warfare phases and highlights the difference between Metz’s characterization of “emulative” and “malignant” insurgent strategies. The third section locates the development of hybrid tactics in the context of ISIS, Boko Haram and the Houthis’ emulative insurgency. A final section concludes.
Methodology

This paper examines three of the most prolific non-state actors in operation over the last 10 years: the Islamic State, Boko Haram and the Houthi Movement. The paper employs a qualitative small-N most-different systems design (MDSD) that selects and analyses three different and largely independent case studies that present the same outcome (violent non-state groups employing practices of tactical hybridity) and explores the relationship between this and the key explanatory variables common to these dissimilar cases.23 MDSD assists with case selection and hypothesis generation as it selects largely divergent cases which nonetheless demonstrate the specific outcome to be explained (i.e. dependent variable - in this case the development of hybrid military tactics). It then identifies commonalities between these cases which can be explored as possible explanatory mechanisms. As noted previously, using a comparative method helps avoid the (fair) criticism that much hybrid warfare theorizing is based on general extrapolations from single cases.24

The three groups analyzed here are largely divergent and independent cases (at least until 2015 – see below): they have separate histories, operate in different countries/sub-regions and have different causes, leaderships and prior interactions with respective opposing state forces. Until 2015 (when Boko Haram became an IS ‘province’) there was minimal operational interaction between BH and IS, and no publicly-known interaction between either Boko Haram or IS and the Houthis (which is in any case highly unlikely). Boko Haram and IS of course both espouse a radical Salafi-Jihadist ideology, but the inclusion of the Houthi case (and the link to former Maoist groups) highlights that the use of an emulative military strategy is not a specifically Salafi-jihadist strategy. Additionally, in the past other Salafi-jihadist groups (such as AQ ‘core’
around Bin Laden) and jihadist thinkers (such as Abu Musab al Suri) have advocated essentially terrorism-focused strategies rather than emulative strategies that would lead to hybridity (however most jihadists, including the aforementioned, do envisage the eventual capture of territory and establishment of political orders by force). IS and the Houthis both benefitted from the upheaval of the Arab Spring but did so in different ways (there was no comparable upheaval in north-east Nigeria). As Boko Haram did align with IS in March 2015, this date is treated as the limits of the most different case design. However, before this date (by at least 2013) both IS and Boko Haram (and the Houthis) had independently shown their hybrid warfare capabilities in attacks on fixed military positions. Indeed, while it is possible that Boko Haram took inspiration from IS as it moved towards joining the group in 2015, the group operated autonomously and built up its operational capacities for hybrid action independently of IS.

As it selects on the dependent variable MDSD cannot by itself ascertain causality, but rather can only point to correlation between the outcome (hybridity) and the other explanatory variables (emulative insurgency). The empirical sections below tackle the question of causality however through process-tracing case studies that allows for the “drawing descriptive and causal inferences from diagnostic pieces of evidence—often understood as part of a temporal sequence of events or phenomena”. In particular, this paper employs a ‘theory-testing process-tracing methodology’ that posits an explanatory mechanism and seeks to then trace the “observable manifestations” of processes through which this occurs. An emulative insurgent strategy is posited as the mechanism driving the development of tactical hybridity and this is traced historically in the case studies through an analysis of Maoist-style guerilla warfare phases.
The ‘diagnostic evidence’ employed here to trace the observable manifestations of this evolution derive from a mix of literature analysis (including several academic analyses such as those by Whiteside28 and Omeni29) an open source investigations approach, and 26 semi-structured interviews with experts on the cases examined. This open source approach relies on systematic review of, and triangulation between, different sources including journalistic sources, think tank reports, official reports and virtual materials from the internet. Some of the observations below rely on secondary open source analysis, but this too involves a knowledge of the techniques used to assess reliability. The author attended two training courses with IHS Janes (July 2018) and Bellingcat (Jan 2019) on these methods. The major advantage of this approach is that it permits analysis of conflicts that are very difficult to reach in practice and leverages (and helps sift through) the vast amounts of data available on these conflicts online. Interviews were conducted in Abuja, Beirut, Brussels and online via Skype and Whatsapp as part of a broader project. Interviews were conducted after the literature and open source research as a means of: 1) accessing additional information; and, 2) validating earlier findings. Indeed, these interviewees were selected firstly on the basis of their subject knowledge and ability to provide additional details that may not be available in print or through online collection methods. However, they also provided a very useful form of validation in that one could run observations from open source material past them for their thoughts. Interviewees included diplomats, the staff of international organizations and international charities, military officials, think-tank analysts, civil society activists and private sector analysts. The vast majority had first-hand experience of the conflicts in question (from experience of being in-country or working extensively with those in-country – principally the former). Some were invited to participate without prior contact, and others (a majority) were accessed through snowballing recommendations with one interview leading to another.
Two important limitations need to be mentioned: firstly, as non-Communists, the insurgent groups here do not readily quote Communist revolutionary leaders and, as such, the observation of Maoist-style practice in this article derives from both close observations of military practice over time (a ‘ground-truth’ test\textsuperscript{30}) and evidence suggesting knowledge of Maoist strategies (or strategic thinking derived indirectly from Maoist thought) in the leadership of the groups. The argument is of course not that these groups are Maoist in a political sense, but rather they have adopted an emulative strategy that shares a lot of parallels with Maoist practice and that they are likely aware of this\textsuperscript{31}. Nevertheless, the tracing of their practice is, of the two, the most important ‘diagnostic evidence’ for the argument here; Secondly, it is suggested here that the adoption of neo-Maoist emulative strategy is the primary but not the exclusive cause of these groups’ hybrid developments. Given the word length restrictions of an article (especially a multiple-case comparative one), assessment of both insurgent strategy and the other important factors that account of these groups’ ability to adopt this hybrid/semi conventional approach (including commonalities in the weaknesses of opposing forces or prior governance failures that breed discontent) is largely beyond the scope of one paper\textsuperscript{32}.

**Explaining Non-state Actor Tactical Hybridity: Concepts**

This section outlines the core concepts used in the analysis below. Given that hybrid tactics are the key dependent variable here (and so as to ensure that we are clear about what is meant by hybrid warfare given the wider contestation of the term), this section starts with a discussion of hybrid warfare as a blurring of irregular and conventional tactics. Like much of the literature on non-state hybrid warfare, it adopts an understanding of hybrid warfare that is built on the original concept advanced by Frank Hoffman.\textsuperscript{33} Next, in order to set out the key explanatory variable under investigation, this section then proceeds to discuss Lyle’s link between Maoism
and hybridity. It does so by building on Lyle’s observations through an examination of Metz’s notion of emulative insurgency strategy and Taber’s account of Maoist strategy that both help understand the core of the Maoist-style military approach and explain the development of tactical hybridity. The final part of this section shows how this emulative approach differs from a malignancy-style approach to insurgent strategy that was more common against US and coalition forces in the post 9/11 wars.

**Dependent Variable: Hybrid Tactics in Non-State Groups**

As noted previously, the term ‘hybrid war’ is widely contested in the literature, with numerous meanings attached to the notion. The concept of ‘hybrid warfare’ as generally applied to non-state actors was popularized by Frank Hoffman, an academic and former US Marine. Hoffman argued that a major trend in contemporary warfare is the convergence of irregular and conventional modes of (tactical) warfighting that were previously considered separate (Hezbollah was his principle reference for the development of these ideas). The use of the term ‘hybrid warfare’ in the literature on non-state hybridity is more focused on this tactical blurring, and is generally much tighter in conceptual usage than the use of the term as applied to state hybrid threats (principally Russia). In addition to Hoffman for example, Hashim, Beccaro, Falode, Gaub and Rauta, have all written empirically about a range of non-state hybrid groups, and have been (albeit in different ways) concerned with the blurring of regular and irregular modes of fighting.

Hoffman’s key argument was that distinctions between warfighting types such as guerrilla warfare, conventional warfare and terrorism have broken down and that conflict is evolving in a more “multi-modal” direction. Hoffman suggested that hybrid threats “incorporate a full
range of modes of warfare, including conventional capabilities, irregular tactics and formations, terrorist acts ... and criminal disorder”. Reflecting the tactical focus of analysis, he suggested that “these multimodal activities can be conducted by separate units, or even by the same unit, but are generally operationally and tactically directed and coordinated within the main battlespace” [emphasis added]. Hoffman’s ideas continue to play a central role in the literature on hybrid warfare. Many of the scholars mentioned above either cite Hoffman as the basis for their understanding of hybrid warfare or use an understanding of the term that is very close to Hoffman’s account (see Piotrowski, Hashim, Gaub and Falode for example).

This discussion helps us for the purposes here to understand what is meant by hybridity: an actor employing tactical hybrid warfare would be expected to show a blurring of irregular and conventional tactics, weapons and objectives. One might expect to see, for example, forms of combined arms operations such as the joint use of artillery and infantry or mounted mobile warfare and artillery, albeit with improvised or novel use of weapons alongside more traditionally irregular actions such as improvised explosive devices, suicide bombings, civilian shields or targeting or hit and run attacks. One may also see actors employing conventional tactics with improvised non-standard weapons, or the opposite, repurposing advanced weapons and tactics for irregular activity. Because of the increased conventionalization this hybridity entails, one would also expect to see non-state actors launching increasingly symmetrical assaults on fixed/defended positions with the intention of capturing them, open battles against larger formations, and the holding of territory, alongside irregular activity such as assassinations, bombings and targeting of civilians.

*Independent Variable: Emulative Insurgent Warfare Strategy*
While Hoffman’s discussions of hybrid warfare made significant impact, the concept was subject to a good deal of critique (as discussed above). Lyle argued that the core features of hybrid warfare theory share parallels with key aspects of Maoist guerrilla revolutionary warfare strategy. As Lyle noted, Maoist insurgent theory involves an approach that, by design, is likely to induce hybrid operations as it proposes a methodology of warfare that sees an insurgency move, in a phased fashion, from irregular action to regular tactics in order to seize political control.

Metz refers to this approach as an emulative method of insurgent strategy. Rather than seek to win asymmetrically as is common in the malignancy method of insurgency (see below), insurgents, initially at a power disadvantage vis-à-vis states, seek to over time to shift the balance to win symmetrically. In this sense, insurgents emulate states by trying to become (militarily powerful) like them as time progresses. Crucially, they generally do so in a cumulative way, bit by bit, with a process of deliberate, but incremental, weapons capture, recruitment, expertise acquisition and augmented capabilities over a given period.

As Lyle notes, as means of attaining victory against more powerful forces, Mao described his conceptual approach as a progression through three (ideal type) phases: strategic defense, stalemate and offense. While Mao suggested that guerilla warfare was “the university of war” and that guerilla actions play a crucial role in the early stages of his triumvirate, he also stressed the importance of the development of regular (“orthodox”) forces over time. One of the best descriptions of this emulation model is offered in one of the classic accounts of guerrilla warfare: The War of the Flea by Robert Taber (a journalist who spent time with Castro and Che Guevara in Cuba). Taber’s account is valuable as he provides a rare comparative
analysis of historic revolutionary warfare (including in China) that considers actions at the tactical and operational levels. His work is also widely known in jihadist circles, which has relevance for two of the cases here.51 Taber describes how revolutionary warfare, can create a virtuous circle for insurgents that yields an accumulation of military hardware, a process of military learning, recruitment and adaptation and the consequent development of the capacity for semi-conventional operations.52 Mapped onto the three stages, the model plays out (in ideal typical terms) as follows:

1) The strategic defense stage sees guerrillas deny battle with their opponents in all but the most fortuitous circumstances. Operating irregularly, they often rely on terrorism or opportunistic low-level hit and run attacks and attacks against local counter revolutionary leaders (politicians, religious leaders, village heads) who would hinder their efforts, but they will generally eschew direct military assaults against well-prepared troops. However, by contrast, insurgents actively seek local, temporary opportunities to attack isolated enemy forces where the military balance favors them.53 Here insurgents briefly turn an overall power deficit into a local power advantage, shifting the balance of asymmetry (temporarily) in their favour. Success yields weapons and equipment, military knowledge and deals a morale blow. It also assists with recruitment. The net effect is more weapons, expertise and recruits that permit more small-scale (but in the moment asymmetrically advantageous) attacks. It is in this sense that the emulative model is cumulative: eventually, this process leads to further weapons captures which yield larger operations that in turn capture more sophisticated and powerful weapons.

2) The second, strategic stalemate phase sees insurgent forces step up their military actions. Providing the necessary expertise, weapons and recruits now are present, insurgents can start
to operate more conventionally, often in a hybrid form, blending small hit and run attacks with massed forces that start to take on state militaries more directly.\(^{54}\) They start to move from a force intent on wearing down their opponent bit by bit, to one prepared to take them on directly in battle for strategic goals, including bases and towns. Overtime they will become more ambitious, driving opposing forces to a stalemate where the government may not be defeated, but it cannot defeat the militants either.

3) Stage three or *strategic counter offensive* sees “the enemy’s destruction by orthodox military operations”\(^{55}\) with these operations not necessarily eschewing irregular operations “but plac[ing] them in a subsidiary role”.\(^{56}\) Once bases are caught, bigger bases can be attacked (yielding further weapons, further demoralizing opponents) etc. At this point, a once-irregular force is now out of the shadows operating (semi-)conventionally and the government is on the back foot facing symmetrical defeat.

Of course, in practice (and in previous Maoist cases), no war progresses in such a linear manner and it is difficult to mark definitively the end of one stage and the beginning of another. Indeed, the notion of phases/stages are heuristic devices to chart the strategy of emulation that drives military power acquisition in practice at different points in time. However, the model highlights the cumulative process of capability acquisition that shifts the balance between guerrilla warfare and regular operations over time. Precisely because the actions of each stage blur into one another, at key points, especially in the latter phases, it is highly likely that insurgent forces will have begun operating tactically in a hybrid fashion, blurring new conventional approaches and weapons with their established irregular techniques and low-tech weapons. Crucially, the development of new semi-conventional capabilities does not necessarily mean the shedding of irregular tactics. The groups discussed here all retained irregular elements, and thus hybrid
postures, as they became more capable. They have all also retreated to these irregular postures as they came under more pressure from regional/international coalitions.

From Malignancy to Emulation? The Character of Contemporary Insurgency

The features described above mark this post-2013 period of insurgency as somewhat distinct from those insurgencies seen during the so-called War(s) on Terror. While there were some instances of direct assaults on Western troops’ outposts and some efforts to hold territory in Iraq and Afghanistan, the form of insurgent strategy seen in both was principally malignant insurgency. As Metz notes, unlike the emulation model, a malignant insurgent strategy does not aim to win through a military victory, but rather through wearing down their opponents psychologically, precipitating withdrawal or collapse. This is especially potent against foreign powers intervening abroad whose commitment to the war in question is likely to be weaker than the insurgents. Metz notes that this strategy is “truly asymmetric, rather than an asymmetric platform to attain parity [i.e. the emulation method]” and that terrorism (in combination with low-level guerrilla attacks) “tends to be more central to insurgents using the malignancy approach”.

Much of the recent literature on insurgency has focused on the attritional, asymmetric, malignancy style type of insurgency that aims to wear down, rather than directly beat, an opponent. This makes sense from a Western-centric analytical point of view as this was the principal (at least proximate) objective of groups like the al Qaeda ‘Core’, al Qaeda in Iraq (and associated insurgencies) and the Taliban. Kilcullen contrasts “classical insurgencies” aimed at replacing the state, with post 9/11 insurgencies which “favor[sic] strategies of provocation (to undermine support for the coalition) and exhaustion (to convince the coalition
to leave Iraq) rather than displacement of the government” noting that Iraqi insurgents represented “a ‘resistance’ insurgency rather than a ‘revolutionary’ insurgency”. 64 Muckian suggests that the “organization and methods [of insurgents in Iraq] are strikingly different from his twentieth century predecessors” aiming to “defeat his opponent by psychological warfare and terrorism instead of military action” 65 Hoffman argues that these post 9/11 insurgencies are quite distinct from Cold War insurgencies and require a new ‘neo-classical counter insurgency’ to match their disruptive, networked forms. 66

The choice of a malignant approach is of course connected in no small part to the combination of the US’s unassailable military power and time-limited commitment to Iraq and Afghanistan. Indeed, both the progenitors of IS and the Taliban have sought to evolve to the emulation approach when facing less formidable local state foes who are nonetheless much more committed. Nevertheless, while the insurgencies discussed below are not demonstrating a new form of insurgent action in historical terms, the hybridity seen and the underlying emulative approach is qualitatively different in character from recent forms of major insurgency faced by the West.

**Contemporary Emulative Insurgency and Hybridity in IS, Boko Haram and the Houthis**

This section traces the evolution of tactical hybridity in the IS, Boko Haram and Houthi insurgencies. The cases explored here all demonstrate non-state hybrid military tactics but only after periods of power acquisition in line with the emulation method. While these examples of hybridity are not identical, sufficient commonalities exist to be able to claim that each non-state actor practices hybrid tactics in its chosen form of fighting and has developed this capacity as part of a broader process of emulative insurgency.
The Islamic State, Emulative Insurgency and Hybridity

While they have lost all the ground they once occupied, between 2012-2014 IS developed a successful form of advanced hybrid military capacity that it used to seize and then hold territory both in Syria and Iraq. During this period IS shed its long-held largely irregular posture and added conventional capabilities to its repertoire. At the same time, like the other cases below, it has never fought entirely like a conventional force.

Neo-Maoist Ideas in ISIS Military Strategy?

This semi-conventionalisation and subsequent hybridity came as the group employed a revolutionary form of insurgency that reflects elements of the Maoist staged model of revolutionary warfare, albeit melded to the unique context of Iraq and Syria. Indeed the methodology of warfare and state formation promoted by IS (outlined in their first edition of Dabiq magazine,) offers a five-stage model for IS ‘empowerment’ that draws (inter alia) on the ideas on Abu Bakr al Naji - a prominent jihadi strategist whose writings mirror elements of Maoist doctrine with clear stages of warfare similar to those outlined by Mao. Other very influential jihadist strategists such as Abu Ubayd al Qurashi and Abd al’Aziz al-Muqrin (who was former leader of al Qaeda in the Arabian Peninsula) have similarly drawn on ideas that are clearly Maoist (even if they are not always attributed to Mao). While it does not talk in Maoist staged terms, issue 192 of IS’s al Naba’ magazine also discusses strategies designed to facilitate the transition from dispersed, small scale irregular actions to more powerful attacks suggesting that less experienced recruits be deployed to the former while those with experience, and the right equipment, be targeted at the latter. Heller describes this in terms of ISIS’s move
up the “operational ladder”. Crucially, in line with Taber’s descriptions discussed above, the article presents this action in terms of “returns”, with this strategy yielding “quantitative and qualitative leaps in the jihad…in material, human, psychological and media terms; and major returns for the mujahideen, in terms of material spoils and attracting new mujahideen for recruitment and work within the detachment”.

**Phases of ISIS Insurgency**

After the early stages of the US occupation of Iraq in 2003, al Qaeda-linked militants in Iraq quickly became a highly proficient users of terrorism, launching a series of devastating campaigns in Iraq designed to challenge the US, the new Iraqi government and to sow sectarianism by attacking the Shia population. Al Qaeda in Iraq (AQI), along with a series of other insurgents, did take part in the seizure of Fallujah (which was cleared by US forces in 2004), but during the US occupation it rarely showed the capacity to take on and beat US forces in direct combat - rather the wider insurgency was itself regularly beaten when it tried to do so. Indeed, Hashim notes that the forebears of the Islamic State struggled with small unit tactics that are a bedrock of conventional military action. AQI recognized this military inferiority vis-a-vis US forces and adapted accordingly to a predominantly irregular guerrilla and terrorist posture. Because of this military disparity, the group evolved to become one of the most effective and innovative users of suicide bombings, especially delivered in the form of suicide vehicle-borne improvised explosive devices (SVBIEDs) – a skillset that was preserved by IS through its numerous incarnations and used in later years a key pillar of IS’s hybrid operations (see below).
IS’s predecessor ‘Islamic State in Iraq’ was significantly degraded by the combination of the US Surge and the ‘Sahwa’ (awakening) of Sunni Tribes from 2006/7, leading to a reformulation of its approach. As Whiteside notes, considerable parallels exist between IS actions towards Sunni tribes after the Sahwa awakening and Vietnamese rebels in the late 1950s and early 60s.\textsuperscript{76} Having learnt the costs of alienating the local tribes in Iraq, from 2007 onwards the group was now in the strategic defensive stage and engaged in significant ‘tribal outreach’ seeking to win over tribal leaders with gifts, economic opportunities and the promise of cooperation, as well as targeting ordinary members of Sunni communities for recruitment.\textsuperscript{77} While this represented an effort to regain trust with a core population base, IS’s new approach to Sunni tribes after 2007 also included violent consequences for those that did not align with the group. Typical of the strategic defensive stage, IS engaged in a major campaign of assassinations against Sahwa leaders and others aligned with the government.\textsuperscript{78} Again, this strategy of subversion and ridding government-aligned officials from areas that IS sought to control in Iraq (seen also in Nigeria and Yemen), mirrored similar efforts by the Vietnamese Communist revolutionaries between the late 1950s and mid-1960s.\textsuperscript{79} This assassination activity continues to the present day.

However, from 2011-13 the group shifted up a gear entering its version of the strategic stalemate stage in Iraq and strategic offensive in Syria. In Iraq, the group started to develop many of the building blocks of its later semi-conventional approach.\textsuperscript{80} Reflecting the emulative process described above, for a number of years from 2011/12, ISIS conducted small attacks against increasingly substantial targets, attacking homes of tribal leaders for example, but growing overtime to small combat posts, then police stations and prisons including a major attack on Abu Ghraib in 2013\textsuperscript{81}. The latter, for example, employed SVBIEDs alongside mortar
and rocket attacks and the use of security teams to attack reinforcements sent by the government – a rudimentary but effective form of combined arms.82

During this phase (in 2012) the group expanded into civil war-wracked Syria, improving its semi-conventional military capabilities in a context where it both faced less pressure than Iraq (IS was not targeted by the Syrian regime for large periods and had more opportunity to gain battle experience in Syria than Iraq - often against other rebel groups). As such, during this period in Syria, IS was developing a hybrid semi-conventional model out of component tactics that it had honed over time in Iraq.83 Between 2012-14 it would start to use them more and more in combination as it seized territory in Syria and then Iraq. Syria was important for IS in this period, not so much because it offered new tactical learning for IS as an organization, but rather because the relative inattention from the Assad regime and the opportunities to win weapons and equipment from other rebel groups (including through many defections to IS), firstly helped to increase IS control of population centers and economic resources in Syria (especially oil) and secondly offered the opportunity to gain significant battle experience84. Syria furthermore provided a context of “competitive recruitment” against other jihadists85. IS was able to recruit well in this context due to its significant economic resources, its battlefield successes and the fact that its leaders had years of experience of insurgency in Iraq that few Syrian jihadist groups could match.86

The group moved fully into a “strategic offensive” in Iraq in early 2014 when the group took a succession of major towns from the government, including Mosul in June 2014 (and captured further major weapons hauls).87 The collective weight and experience of its operations in Syria and Iraq, combined with the new weapons, now allowed the group to operate in a more mobile and aggressive way. As Kilcullen notes by this point IS was a far more capable force organized
into larger and specialized fighting groups, operating openly in the day, often wearing uniforms, using standardized field equipment and weapons and able to conduct fast paced, conventional maneuver tactics.\textsuperscript{88} The fighting in Iraq in 2014 that saw the capture of Fallujah, Tikrit, Ramadi and Mosul (amongst other towns), involved semi-conventional action by ISIS including combined arms operations with coordinated use of armour and tanks, artillery, infantry and snipers.\textsuperscript{89} As Kilcullen stresses, by 2014 ISIS had “moved out of the shadows” and was “thinking like a state”.\textsuperscript{90}

\textit{ISIS Tactical Hybridity}

However, even as it shifted to more conventional operations, Barfi suggests that ISIS still thought in some ways like an irregular force, remaining highly mobile, often relying on surprise and superior, innovative tactics against numerically bigger forces, rather than size and traditional direct firepower.\textsuperscript{91} Despite the fast-paced conventional maneuver warfare, IS was still using guerrilla type tactics and extensive use of SVIEDs. However, by now, these tactics were employed alongside semi-conventional approaches. This is partly attributable to its leadership that comprised both hardened jihadists and veteran Baathist Iraqi Army commanders.\textsuperscript{92} IS was stripped of the rigid hierarchy and top-down leadership that beleaguered many traditionally ordered Arab armies, yet it was also able to benefit from the conventional knowledge that these commanders brought.\textsuperscript{93} Combined with the trial and error of over ten years of fighting, it made for a potent hybrid force.

The seizure of Ramadi in 2015 provides one example among many. IS forces attacked Ramadi for weeks with IEDs and suicide bombers forcing Iraqi troops back into their bases in the center of the city. Under cover of a sandstorm IS attacked at first with an armored bulldozer that
breached Iraqi defenses. This was then followed by a wave of six SVIEDs targeted at key Iraqi government defenses. In a case of IS tactical innovation, a tactic previously used to attack civilians was now being deployed against military targets and playing the role that precision airstrikes and artillery barrages would play for Western forces. As Kilcullen notes, IS tactics in Ramadi were classic examples of defence breaching taught to conventional forces across the world. However, their highly unorthodox use of SVIEDs and other improvised approaches is further evidence of the irregular means through which IS was by this point achieving regular, conventional objectives.

**Boko Haram, Emulative Insurgency and Hybridity**

After its turn to violence in 2009, Boko Haram demonstrated a progression from irregular actions in a stage of strategic defense to semi-conventional hybrid tactics and strategic stalemate/offence. This culminated in the establishment of the ‘Caliphate’ in Nigeria in 2014 (see endnote 4). The Boko Haram movement today is composed of two main factions following a major split in 2016: One faction led by BH founder Mohammed Yusuf’s former deputy Abubakar Shekau (often referred to by BH’s original name Jama’at Ahl as-Sunnah lid-Da’wah wa’l-Jihad – ‘the People Committed to the Prophet’s Teaching and Jihad’), or JASDJ for short, and a second breakaway faction known as the ‘Islamic State West Africa Province’ (ISWAP). As noted above, this paper only considers Boko Haram’s emulative insurgency up to 2015, when then the group was largely disconnected from IS.

*Neo-Maoist Ideas in BH Military Strategy?*
Unlike IS, there is very little public discussion of strategy by Boko Haram (beyond the question of civilian targeting which was a major point of contention in the 2016 split). Following the split, in an interview with IS’s *al Naba’* magazine, the then new-ISWAP leader Abu Musab al-Barnawi does appear to put the history of the wider Boko Haram movement into the staged process as defined by IS and refers to *Boko Haram’s* “transition to the stage of guerrilla war (ḥarb al-‘iṣābāt) to the stage of consolidation (al-tamkīn) and the extension of control”. This has clear echoes of Abu Bakr Naji’s staging as described above (and the reflections of neo-Maoist ideas therein). However, as it is a retrospective account it cannot be said to prove *in and of itself* prior (pre-2016) Maoist strategic thinking in Boko Haram. Nonetheless, given the ubiquity of Maoist ideas in jihadist thought, it is very likely that senior Boko Haram members (some of whom having also trained with al Qaeda in Mali where these ideas are also likely to be well known and discussed) will have been aware of these concepts and ideas before aligning with IS.

*Phases of the Boko Haram Insurgency*

Boko Haram’s growth in military capacity can be understood in phased terms. Reflecting a defensive stage, and at the more irregular end of the spectrum, the early years of Boko Haram’s violent operations (2009-12) were characterized by assassinations and lower-level attacks against government targets. Like the case of IS above, BH operatives targeted local politicians, religious leaders and state officials, attacking those that would hinder the spread of their message and who might be in a position to inform on them. The group became infamous however, through its waves of terrorist bombings in Nigeria firstly directed against Northern Christians and later against the wider Muslim population as well (often killing Muslim bystanders in attacks that were targeted at police and the military).
From 2013/14 Boko Haram increasingly used terrorist tactics in conjunction with mobile raids on civilian centres in Muslim areas. These often have multiple objectives including intimidation, punishment for perceived collaboration with government forces and civilian militia (the Civilian Joint Task Force - CJTF), the seizure of goods and kidnapping of women and children. A characteristic trademark of such Boko Haram/JASDJ attacks is the use of suicide bombings to initiate an attack, indiscriminate attacks on civilians and the burning of homes. A post-split JASDJ example of this type of attack can be seen in a raid in January 2016 on the town of Dalori, near the capital of Borno state, Maiduguri. Contemporary accounts from Dalori talk of people burned in their homes, gun attacks on civilians and simultaneous attacks by female suicide bombers who had infiltrated the town. The investigative group Bellingcat has used before and after satellite imagery to document the extent of such activity in Dalori highlighting extensive destruction with swathes of houses and trees burnt to the ground

At the same time, from 2012/13 onwards, Boko Haram developed the capacity to attack military patrols, outposts and, later, bases and towns showing a move from strategic defense to stalemate (and later a period of strategic offence around 2014). While Boko Haram (in contrast to ISWAP) does not correspond to the wider population-centric elements of the Maoist model, in military terms its progression shares parallels with the “Maoist archetype”. This evolution demonstrated more sophisticated tactics over time and the capacity to increasingly confront the Nigerian military and beat them symmetrically in tactical engagements. Thurston argues that, in line with the general argument in this paper, it may have been engagements with the military that provided BH with the opportunity to make this shift. The government declared a state of emergency in 2013 (following an earlier one in 2012), placing many under-equipped and under-prepared soldiers into theatre. Boko Haram was able to oust some of these soldiers from
isolated bases, boosting significantly its arsenal. Many of the interviews conducted for this research highlighted Boko Haram’s capture of Nigerian Army weapons.\textsuperscript{111} In line with the emulation model outlined above, Omeni documents how Boko Haram in this period employed local asymmetries, attacking troops with a unit size at least one bigger than the Nigerian Army (a platoon attacks a section, a company a platoon etc.).\textsuperscript{112} This in turn permits other more expansive engagements with the military overtime as troops are forced out and their weapons captured. By 2013 Boko Haram was even in possession of some tanks and armored personal carriers\textsuperscript{113}. As described above, and in the section above on IS and inline with the logic of the emulation method, these ‘returns’ could be ‘reinvested’ in bigger attacks overtime in a positive cycle of growth for the group.\textsuperscript{114} The culmination of this growth was a period of strategic offense in 2014, resulting in the capture of a string of town’s and the “Caliphate” declaration in August 2014.

\textit{Tactical Hybridity in Boko Haram}

In many cases the group combined semi-conventional attack tactics (using captured weapons - especially anti-aircraft guns mounted onto ‘technical’ trucks\textsuperscript{115}) with continued irregular actions such as suicide bombing or the razing of towns. Following earlier major attacks (such as the Giwa Barracks raid in Maiduguri in March 2014), a clear example can be seen in January 2015 when Boko Haram launched an assault on the then headquarters of the Multinational Joint Task Force (MNJTF) and the nearby towns of Baga and Doron Baga in North Borno state.\textsuperscript{116} Arriving at the base (manned only by the Nigerian military at the time) in a convoy of trucks, cars and an armored personnel carrier and organized into assault and security teams, Boko Haram attacked with rocket propelled grenades, small arms fire and improvised explosive devices until the soldiers and civilians defending the base were forced to withdraw to nearby
Baga. They then attacked the town of Baga itself, again using similar support and assault team tactics. Boko Haram fighters then attacked the lightly-defended nearby town of Doron Baga, seizing the town and razing much of it. Despite the eventual recapture of Baga a month later, both the tactics and level of ambition in this assault are more reminiscent of a quasi-conventional force than a simple guerrilla force. Similar dynamics can be seen in the capture of Head Quarters 5 Brigade of the Nigerian Army in Monguno in January 2015 where BH reportedly deployed 1000’s of fighters with a surprising high level of firepower to oust an entire battalion. The group, like IS later, lost much of its territory after this high point in 2015, but Boko Haram’s ability to seize territory and take on Nigerian forces highlights the extent of its hybrid, semi-conventional capabilities.

The Houthis, Emulative Insurgency and Hybridity

The Houthi Movement in Yemen has risen over 15 years from an initially non-violent religious revivalist movement to become a major political and military force that, by 2014-15, had captured large parts of Yemen including the capital city of Sana’a and contested for control of Aden in the South. The Government of Yemen under former President Saleh fought six wars against the Houthis from 2004 to 2010 (the ‘Sa’dah Wars’) in an effort quell the movement. The government of current Yemeni President Hadi (backed by Saudi Arabia and the UAE and supported by the US/UK) is currently embroiled in a seventh war far bigger in geographical scope and political stakes. At the time of writing, the Houthis constitute the most powerful domestic force in Yemen. As will be shown, while the Houthis developed hybrid capabilities under their own steam through the Sa’dah wars, they were further boosted by the chaotic conditions in Yemen post Arab Spring after 2011 and by conventional defections from former enemies in the Saleh regime after 2014.
Neo-Maoist Ideas in Houthi Military Strategy?

The Houthis appear to have taken some inspiration from abroad that is pertinent here. Journalist Robert Worth quotes Daifullah al-Shami, head of the Yemeni Saba News Agency (now Houthi-aligned) as noting that Houthi leaders learned from the history of previous revolutionary wars including those in Vietnam and Cuba, and the actions of Hezbollah against Israel. While the Houthis maintain a largely independent strategic position from Hezbollah (and Iran), the Lebanese group is a key supporter of the Houthis and is thought, along with Iran, to have provided guidance and training (see below). Transfeld suggests parallels between the Houthi takeover of Sana’a and Hezbollah’s take-over of West Beirut in 2008 noting that similarities “suggest some exchange on military strategy”. Hezbollah, as Lyle notes, is an organisation that is well versed in revolutionary warfare practice having itself progressed from terrorist organisation, to guerrilla force to standing semi-conventional army. Daifullah Al-Shami, also notes how senior Houthi officials have referred to the protracted nature of the conflict and argue that, like Vietnam for the US, it will prove a long, attritional war and quagmire for Saudi Arabia. Again, there is no smoking gun of senior leaders quoting Mao, but there is evidence that the leadership is likely to be aware of these Maoist military ideas.

Phases of the Houthi Insurgency

As the six Sa’dah Wars progressed, the Houthis demonstrated a growing capacity in guerrilla warfare. Facing an initially far more powerful Yemeni government, in their own strategic defense stage Houthi forces relied on a network of small and largely autonomous platoon-sized units using irregular tactics, for example, becoming effective users of improvised explosive
devices (IEDs) and mines for targeting Yemeni government forces. They, like Boko Haram and IS, also adopted irregular tactics of assassination focusing on prominent civilian and military individuals aligned with the government. The Houthis also attacked property and land held by prominent opponents in efforts to drive them out of contested areas. The Houthis quickly developed capacity beyond these largely irregular operations however as the Sa’dah wars progressed. As above, the opportunities afforded by regular conflict gave the group the opportunity to develop militarily. During these latter wars (especially the 5th and 6th) the Houthis employed more sophisticated capabilities in ambush techniques against troops and raids against Yemeni government forces with numerous instances of Houthi attacks on Yemeni government positions resulting in capture of soldiers, positions and weapons. By the Sixth War, reports emerged from northern Yemen of attacks by multiple Houthi groups including vehicles and the coordinated use of fire in bold attacks on government positions. In August 2009, for example, Houthis besieged the Yemeni Army’s 105th Infantry Brigade for seventeen days eventually forcing its withdrawal and capturing many of their weapons. In evidence of strategic stalemate, as Clausen notes, despite reports that the Government deployed 40,000 troops to Yemen’s north in the last war, the result was a stalemate and ceasefire. Indeed, as Knights highlights, by 2010 the Houthi fighters “were able to fight the Yemeni Government to a standstill in four provinces, seize and hold strategic towns, force entire surrounded brigades into surrender and carve out tactical footholds in Saudi Arabian border settlements”.

The full extent of the Houthis hybrid capabilities came to the fore during the most recent and more extensive Yemen crisis that started with the Arab Spring uprisings in 2011 (in which Houthis took part), and dramatically ramped up in 2014 and early 2015 with the Houthi advance on and eventual takeover of Sana’a. One of the main effects of the Arab Spring from 2011 onwards was to weaken the Yemeni government and their ability to resist Houthi
advances first in and around Sa’dah and then in the capital and beyond. This is partly because forces were preoccupied with events in Sana’a where major protests were taking place from early 2011, and partly because of defections that split major parts of the military as protests unfolded. During the capture of Sana’a, the Houthis, now aided by their erstwhile enemy former President Saleh who helped organize defections of conventional military formations to the Houthis, seized advanced weapons including roughly 45 tanks, armored personnel carriers and unknown quantities of medium and light weapons. Furthermore, throughout 2015, Saleh loyalists continued to facilitate arms transfers and active military support to Houthis. The Houthis, like IS, used their effective intelligence and tribal connections, along with the support of Saleh to set up a series of defections to the Houthis that ceded manpower and territory to the now bolstered Houthi force. These defections also yielded extensive stocks of weapons including tanks, artillery, anti-aircraft guns and short-range ballistic missiles. The UN Panel of Experts on Yemen estimated in early 2017 that through diversion and seizures the government of Yemen may have lost up to 68% of its total weapons stocks. One expert interviewed for this article stated that this rolling defection of Saleh forces, allowed Houthis to gain access to weapons in a manner that functioned like pre-positioned weapons stocks. The Houthis adopted a rapid and fluid ‘bite and hold’ approach moving quickly past static opponents, and capturing territory. Collaboration between Houthis and Saleh forces was complicated at higher levels due to mistrust and the sidelining of senior officers by the Houthis (both sides had been fighting each other for a decade previously), but orders from Saleh drove the cooperation (albeit with Saleh, like some Baathists in Iraq with IS, overestimating his ability to control the Houthis – leading ultimately to his demise). However, integration of troops at lower levels was less complicated and facilitated by tribal/northern links. While Saleh was killed by Houthis in 2017, many former regime soldiers resorted to tribal connections and remained within Houthis structures after Saleh’s death.
Fighting in the south of Yemen in 2015 showed signs of the hybridity these weapons captures and defections/integration of conventional forces afforded. The Houthis were capable at this stage of long range rapid offensives seeing coordination between Houthi and former Saleh troops (although they did not reach the sophistication of IS and the group’s fighters were still vulnerable to Saudi airpower and local responses coordinated with UAE special forces). In Aden, for example, Houthi-Saleh forces blocked off key entry points and lay siege to the city with extensive shelling and rocket attacks (including of civilian areas). Houthi forces drove into the city using tanks and armored vehicles alongside dismounted fighters. Houthis engaged in pitched battles against local militias operating in support of President Hadi. By this point Houthi forces were firmly on the (strategic) offensive. Houthi actions against Yemeni forces have also been supplemented by new technologies (likely from Iran) including well documented use of targeted armed drones. On January 10th, 2019, for example, Houthis flew a drone into a military parade in the Al Anad Military base injuring a number of high-ranking officers.

Like IS and Boko Haram however, Houthi forces have not transformed into a fully conventional force and have had to adjust their tactics especially following the intervention by the Saudi-led coalition, retaining a hybridization between their more conventional approaches and irregular combat. Particularly in defensive postures, Houthi troops have adopted dispersed formations (limiting their exposure to airstrikes), relied extensively on the use of landmines and IEDs and are reported to have increased their use of civilian cover such as operating from schools and hospitals. These actions described above show a mixture not only of
conventional tactics (pitched battle, rudimentary combined arms) but also ongoing use of other tactics (sniping against civilians, dispersed formations, the use of IEDs, the use of schools and hospitals as cover) that are more characteristic of irregular forces.

**Conclusion: The Comparative Character of Tactical Hybridity in Contemporary Insurgency**

This article has provided a comparative evaluation of the drivers of tactical hybridity among contemporary non-state actors. As shown above, the three insurgencies examined here have demonstrated patterns of tactical hybridity as an important feature of their fighting. As has also been shown, each group demonstrated a gradual, but deliberate emulative form of insurgency that allowed them to develop hybrid tactical capabilities and escalate their capacity over time.

Specifically, this article had two core objectives. The first was to demonstrate, building on the argument presented by Lyle, that the development of hybrid tactical abilities is a function of a Maoist-style emulative insurgent strategy. As the three case studies demonstrate, all three of the groups here have adopted a deliberate cumulative model of insurgency with each aiming to grow over time from a relatively weak insurgency into a much more formidable force capable of winning through the direct military defeat of their opponents. All three have moved through Maoist-like stages, with initial subversion and low-level attacks leading to bigger attacks, greater expertise and weapons captures. These successes generate a self-reinforcing circle of attacks, equipment-gain, knowledge-acquisition and growing conventionalization leading to the generation of momentum that can defeat opponents increasingly symmetrically (and bring others onside - especially in the Houthi and IS cases). This, it was noted, is distinct from a more asymmetric insurgent strategy that aims to win through psychological coercion and attrition.
rather than direct kinetic action. It is important to remember that adopting this model is a strategic choice, not an automatic process and tactical hybridity represents an important middle to late stage on this process. None of the groups are Maoist in a political sense, but there is evidence to suggest that they are aware (or very likely aware) of Maoist military ideas, and their practice certainly shows parallels with the models adopted by Cold War Communists even if there are of course differences between their trajectories. This has important implications for how we see hybridity among non-state actors. Rather than a novel and distinct phenomenon, the article shows that modern expressions of hybridity are a feature of a much older Maoist-style military strategy.

Studies of non-state tactical hybridity are rarely comparative. However, this article is comparative in two senses: 1) it compares between the groups in question and 2) it explores these contemporary cases through a framework based on the experience of groups in the past. Assessing hybridity comparatively within a Maoist strategic framework helps manage critiques of both astrategic thinking and ahistoricism. Specifically, it does so by helping to understand both the historical military evolution of the groups themselves as well as understand the strategic parallels between contemporary insurgencies and others from the Cold War era. While it is impossible from this study to claim full generalisability to all groups practicing tactical hybridity, carrying out this research comparatively also helps avoid “generalisation from the specific” and gives more weight to the findings.

Finally, the second core objective of this article was to highlight what the above means for our understanding of insurgency today. Through a discussion of the difference between malignant and emulative insurgency, the paper sought to show that Boko Haram, the Houthis and the Islamic State all represent a different model of insurgency from that seen in the post 9/11 wars
against US coalitions in Iraq and Afghanistan. Rather than a high level of (in Metz’s terms ‘truly asymmetric’150) asymmetry, a flat networked structure and an attritional strategy based principally on terrorist and low-level guerrilla tactics aimed at wearing down your opponent psychologically, emulative insurgency based on the Maoist model, becomes less asymmetric over time, more hierarchical and more capable of defeating opponents directly in battle with conventional force as time passes. This is an evolutionary process however and groups are not always fixed in one model or another, nor is the movement through Maoist-style phases only one way (indeed the groups above have moved back through the phases as the pressure on them has increased). Understanding military hybridity among non-state actors as a function of a Maoist-style emulative insurgent strategy however helps us not only recalibrate our understanding of hybrid warfare to account for its strategic underpinning and historical precedents, but also provides a window onto the evolving character of contemporary insurgency more broadly over time. As we look to understand the future of insurgency and hybrid warfare tactics, we may also wish to turn our attention more often to the strategic models of those in the past.


4 It is not entirely clear whether Shekau was declaring an independent caliphate or an extension of the IS caliphate in August 2014 (probably the latter). See Abu Bakr Shekau, “Declaration of an Islamic Caliphate” trans. Abdulbassit Kassim, in *The Boko Haram Reader: From


7 Tuck, “Hybrid War”.


9 Beccaro, “Modern Irregular War”, 209.

10 Unfortunately, the paper appears to have been recently taken down, along with the rest of the UKDF website. The paper was previously available here: Stuart Lyle, “Maoism Versus Hybrid Theory - Is the Military Being Distracted by the Latest Doctrinal Buzzword”, last modified 2011, accessed March 14th, 2019, http://www.ukdf.org.uk/assets/downloads/111201MaoismversusHybridtheory.pdf. Lyle’s piece was also cited by Francis Grice, The Myth of Mao Zedong and Modern Insurgency. (Springer, Cham: 2018): 8. The site (but not the paper) can be found via the ‘Wayback Machine’ site: https://web.archive.org/web/20181018084440/http://www.ukdf.org.uk/

11 Ibid.


17 Steven Metz. “Insurgency”, 125.


20 Ibid. 16-17.


24 Chris Tuck, “Hybrid War”.


28 Whiteside, "The Islamic State and the Return of Revolutionary Warfare".

29 Omeni, "Boko Haram’s Increasingly Sophisticated Military Threat".

30 Ryan, Decoding al Qaeda’s Strategy, 8, 12.

31 Ibid., 12.

32 But is the focus of ongoing research by the author.


36 Hoffman, Conflict, 14; Johnson, “Hybrid”, 149.


40 Ibid., 36.

41 Ibid.


Lyle, “Maoism”, 4-5.


Ibid, 57.

Robert Taber, The War of the Flea.

Ryan, Decoding al Qaeda’s Strategy, 132.

Robert Taber, The War of the Flea, 50-51

Ibid., 48-49

Ibid., 50-51.


Hashim, “State and Non-State Hybrid War”.

It should be noted however that in Afghanistan the Taliban did engage in some semi-conventional operations and at times pin down Western forces in exposed bases. Nevertheless, Western forces never came close to being defeated overall in Afghanistan and the Taliban’s strategy functioned largely through attrition.

Metz, “Insurgency”, 125.


Metz, “Insurgency”, 125.

Metz, “Insurgency”, 125.


Kilcullen, "Counter-insurgency Redux.", 115.

Muckian, "Structural Vulnerabilities”, 14.


Hashim, “State and Non-State”; Beccaro, “Modern Irregular War”.

37


Ryan, _Decoding al Qaeda’s Strategy_, 91; Al-Muqrin, _Al-Qa’ida’s Doctrine for Insurgency_, 94-102.


Sam Heller, _Twitter Post_, last modified April 20, 2019, accessed September 10, 2019, https://twitter.com/AbuJamajem/status/111969694761678848

Heller, “Islamic State: Substantial Continuous ‘Returns’”.

Hashim, _The Caliphate at War_, 188.

Ibid., 188-191.

Whiteside, “The Islamic State and the Return of Revolutionary Warfare,” 744.

Ibid., 763-767; William McCants, _The ISIS Apocalypse_, (New York: St Martin’s Press, 2015), 152.

Whiteside, “The Islamic State and the Return of Revolutionary Warfare”, 764

Ibid., 749-752.

Interview, Think-tank-based Security Analyst with extensive expertise on IS, 12th November 2019, via Skype.

Ibid.


Interview, Think-tank-based Security Analyst with extensive expertise on IS, 12th November 2019, via Skype.

Interview, Former Security Analyst for a Western NGO operating in Syria, 17th November, 2019, via Skype; Interview Private Sector Security Analyst working with extensive expertise on Iraq, 19th November, 2019, via Skype.

Interview, EU Official with extensive expertise on Iraq, 30th October 2019, London.

Interview Private Sector Security Analyst working with extensive expertise on Iraq, 19th November, 2019, via Skype.

Whiteside, “New Masters of Revolutionary Warfare” 15.

David Kilcullen., _Blood Year: The Unraveling of Western Counterterrorism_, (Oxford: Oxford University Press, 2016), 84-85, 94.

Ibid., 94.

Ibid., 85.


Ibid., 20

Ibid., 20


Coker, “How Islamic State’s Win”.

Kilcullen, _Blood Year_, 145.
97 Ibid.


101 Ibid.

102 Indeed, one cannot be certain that this was not edited by IS itself to fit its methodology.

103 Omeni, "Boko Haram’s Increasingly Sophisticated Military Threat.", 900-903.

104 Thurston, Boko Haram, 153.

105 Ibid., 155.

106 Ibid., 157.


110 Thurston, Boko Haram, 204

111 Numerous interviews with Nigerian military officers, Western diplomats and Nigerian security analysts, 13-19th October 2019, Abuja.


113 Ibid, 890.

114 Interview, Former General in the Nigerian Army, 13th October, 2019, Abuja.

115 With some bought from Libya after the collapse of Gadhafi. See Ibid., 888.


123 Lyle, “Maoism”, 7-8

124 Worth, “How the War in Yemen Became a Bloody Stalemate”.


126 Salmoni, Loidolt and Wells, “Regime and Periphery”, 207.

127 Ibid., 209.

128 Ibid.

129 Ibid.

130 Maria-Louise Clausen, “Competing for Control over the State: The Case of Yemen.” Small Wars & Insurgencies 29, no. 3 (2018): 564.


133 Ibid., 209.


136 Interview, Think-Tank Based Expert on Yemen, 12th November, 2019, via Skype.


139 Interview, Think-Tank Based Expert on Yemen, 12th November, 2019, via Skype.

140 Ibid.

141 Ibid; Interview, EU Expert on Yemen, 22nd November, 2019, Brussels.

142 Ibid.

143 Ibid.

144 Interview Private Sector Expert Analyst on Yemen, 19th November, 2019, via Skype; Interview Think Tank-Based Expert on Yemen, 12th November 2019, via Skype.


146 Bin-Lazrq and Fahim, “Yemen’s Despair on Full Display”.


150 Metz, “Insurgency”, 125.