Martial Race Theory in Contemporary Operational Planning

A Monograph

by

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In 2020, North American society and institutions are grappling with racism. Military leaders and planners are working to understand racism, how it is manifest in military organizations, how individuals within the force retain racist ideas, and how racism could affect the operational performance of the military in the execution of its most critical missions. Martial Race Theory was a highly formalized, operationalized, and prolific marriage of racist ideas and racist policies of a military nature to arise in the era of modern warfare. Operational planners who understand the history of Martial Race Theory and its impacts upon operations will be better prepared to address racial and ethnocentric bias within contemporary operational planning. This monograph will introduce the concepts of martial race theory and martial race thinking. It will then describe how martial race theory fits into the larger academic body of knowledge of social dominance theory, theories of racism, and theories of ethnocentrism. Once terms are defined, the impact of martial race thinking on operations will be explored via three historical cases. Finally, an analysis of the potential impacts of martial race thinking and its influence upon contemporary operational planners will be conducted and recommendations to address those impacts will be proposed.

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Abstract

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In 2020, North American society and institutions are grappling with racism. Military leaders and planners are working to understand racism, how it is manifest in military organizations, how individuals within the force retain racist ideas, and how racism could affect the operational performance of the military in the execution of its most critical missions. Martial race theory was a highly formalized, operationalized, and prolific marriage of racist ideas and racist policies of a military nature to arise in the era of modern warfare. Operational planners who understand the history of martial race theory and its impacts upon operations will be better prepared to address racial and ethnocentric bias within contemporary operational planning. This monograph will introduce the concepts of martial race theory and martial race thinking. It will then describe how martial race theory fits into the larger academic body of knowledge of social dominance theory, theories of racism, and theories of ethnocentrism. Once terms are defined, the impact of martial race thinking on operations will be explored via three historical cases. Finally, an analysis of the potential impacts of martial race thinking and its influence upon contemporary operational planners will be conducted and recommendations to address those impacts will be proposed.

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Introduction

In 2020, North America confronted the racism that is endemic within its society. Terms like "institutional racism," "systemic racism," and "antiracism" had previously been the domain of academics and activists. Public protests of historic scale propelled these terms into broad use by the general public. The response to the protests by politicians, police, and military officials highlighted a level of ignorance and confusion as they attempted to use the terms in the defense of their organizations. The initial embarrassment of the spring of 2020 led to concerted efforts by military professionals to understand racism, how it is manifest in military organizations, how individuals within the force retain racist ideas, and how racism could affect the operational performance of the military in the execution of its most critical missions.

As a term, racism is amorphous, changing dramatically over the history of its use. The Merriam-Webster dictionary defines racism as a noun, "a belief that race is a fundamental determinant of human traits and capacities and that racial differences produce an inherent superiority of a particular race."[1] Dr. Ali Rattansi, a seasoned researcher of racism and author of *Racism: A Very Short Introduction*, argues that "short, tight definitions mislead … Brevity and accessibility are not good enough excuses for oversimplification."[2] This is an argument that this monograph will bear out.

Dr Ibram X. Kendi is one of America's foremost historians and leading antiracist scholars. He attempts to avoid the trap of a short, tight definition, by proposing a somewhat circular definition of racism "as a marriage of racist policies and racist ideas that produces and normalizes racial inequities."[3] Racist ideas are "any idea that suggests one racial group is inferior

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[1] *Merriam-Webster.com*, s.v. "racism," accessed March 17, 2021, https://www.merriam-webster.com/dictionary/racism.

[2] Ali Rattansi, *Racism: A Very Short Introduction* (Oxford: Oxford University Press, 2007), 1.

[3] Ibram X. Kendi, *How to be an antiracist* (New York: One World, 2019), 18.

or superior to another racial group in any way."[4] Dr. Kendi goes on to explain racist policies as "any measure that produces or sustains racial inequity between racial groups." He distinguishes racist policies from "institutional racism," "structural racism," and "systemic racism," as they are redundant and unclear. "Racism itself is institutional, structural, and systemic . . . . Racist policy says exactly what the problem is and where the problem is."[5] In military terms, policy equates to orders, and the planning behind those orders.

Dr. Kendi's descriptions of racism, racist ideas, and racist policies create a theoretical basis to understand the link between racist individuals within the military and their influence in turning operational planning into racist policy. Understanding how operational planners create racist policy is essential to address the racism within, and the racism perpetuated by, military organizations. This monograph will show that military organizations who allowed racism to influence their operational planning suffered from fundamental surprise, tactical defeats, increased casualties, and unsatisfactory political outcomes from conflict as a result. Operational planners codified racist thinking in operational planning via the proliferation of martial race theory at the turn of the 19th century. Martial race theory described a way of visualizing the operational environment that continues to manifest itself in contemporary operational planners today.

Martial race thinking is a flawed heuristic technique for assessing capabilities of allies, enemies, and neutrals that preferences personal experience, anecdotal evidence, and prediction by representativeness.[6] It negatively influences the development of a model of the operational environment, the assessment of risks, and the establishment of end states and conditions. By understanding martial race theory and its impact on operational planning throughout history,

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[4] Kendi, *How to be an antiracist*, 20.

[5] Ibid., 18.

[6] Prediction by representativeness is confidently predicting inaccurate outcomes based on the representativeness of available data. Daniel Kahneman, *Thinking, fast and slow* (New York: Farrar, Straus and Giroux, 2011), 149.

contemporary operational planners can learn to guard against the biases that create racist policy and become anti-racist in the planning and execution of operations. By rejecting martial race thinking, planners will achieve a deeper understanding of the operational environment, potentially saving lives, conserving resources, and achieving more resilient and enduring operational outcomes.

This monograph will introduce the concepts of martial race theory and martial race thinking. It will then describe how martial race theory fits into the larger academic body of knowledge of social dominance theory, theories of racism, and theories of ethnocentrism. Next, this monograph will explore the impact of martial race thinking on operations via three historical cases. Finally, this monograph will present an analysis of the potential impacts of the martial race thinking of contemporary operational planners and propose recommendations to address those impacts. Taken together this will provide a foundation from which practitioners can build an understanding to develop the habits of mind necessary address racial bias in planning.

Martial Race Theory

Martial race theory emerged in British India in the 19th century as a belief that some groups of people are biologically or culturally predisposed to the art of war.[7] It was a subset of broader British thinking that certain castes, tribes, religious groups, and those groups inhabiting distinct geographical regions had ancestral traits which made some inherently martial.[8] The customs and self-image of many Indian communities, as well as the operational experience of the British officers familiar with Indian troops, reinforced British ideas that some groups were inherently martial while others were inherently non-martial.[9] In addition to biological characteristics, British officers blended racist and ethnocentric beliefs to develop their theory of martial race in the Indian subcontinent while leveraging the local distinctions between castes, tribes, religions, and geographic areas to identify martial races.[10]

The Sepoy Rebellion of 1857 was a fundamental surprise for British officers and colonial administrators which allowed proponents of martial race theory to increase the operationalization and institutionalization of their theory within the Indian army. In 1885, Lord Roberts of Kandahar, who was a major proponent of martial race theory, became Commander-in-Chief in India and formally adopted martial race theory as doctrine.[11] Martial race theory directly and

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[7] Heather Streets, *Martial races: The Military, Race and Masculinity in British Imperial Culture, 1857–1914* (Manchester: Manchester University Press, 2004), 1.

[8] William Arthur, "Martial Episteme: Re-thinking Theories of Martial Race and the Modernisation of the British Indian Army during the Second World War," in *The British Indian Army: Virtue and Necessity,* ed. Rob Johnson (Newcastle: Cambridge Scholars Publishing, 2014), 153.

[9] David Omissi, *The Sepoy and the Raj, The Indian Army, 1860–1940* (London: Macmillan Press, 1994), 24; Arthur, "Martial Episteme," 153; Lord Roberts of Kandahar, *Forty-One Years in India: From Subaltern to Commander-in-Chief* (London: Richard Bentley and Son, 1898), 532, http://www.gutenberg.org/files/16528/16528-h/16528-h.htm.

[10] Tarak Barkawi, "Peoples, Homelands, and Wars? Ethnicity, the Military, and Battle among British Imperial Forces in the War against Japan," *Comparative Studies in Society and History* 46, no. 1 (Jan 2004): 140, https://www.jstor.org/stable/3879416; Omissi, *The Sepoy and the Raj,* 25; Jacob A. Stoil, "Martial Race and Indigenous Forces in the Levant and Horn of Africa: A Legacy of the Indian Army Manifest?" in *The British Indian Army: Virtue and Necessity,* ed. Rob Johnson (Newcastle: Cambridge Scholars Publishing, 2014), 169.

[11] Amar Farooqui, "'Divide and Rule'? Race, Military Recruitment and Society in Late Nineteenth

overtly impacted the recruiting practices within India by classifying less than ten percent of the population as martial.[12] The Indian army heavily recruited the Gurkhas, Sikhs, and light skin Muslims and excluded the Bengalis, Mahars, Hindus, and Indians of darker skin colour.[13] A class-regiment system was instituted across the army to ensure regiments were racially pure, prohibiting intermingling between martial races. The class-regiment system also ensured companies remained uniform by caste, to maintain the social hierarchy within the regiment.

The regiments dominated by the martial races also had a significant advantage in operational experience. Those regiments stationed along the turbulent north western frontier with Afghanistan gained a fighting reputation due to the constant conflict along the border.[14] This favorable environment of operational experience attracted the best British leadership and led to a reinforcement of the myth of the martial race's martial prowess.[15] With martial race recruiting filling the ranks of the Punjabi and Bengal armies, and those same armies rapidly gaining operational experience on the frontier, demand for martial races increased across India.[16] By the turn of the 19th century, the martial races had attained a hegemonic position within the Indian Army, resulting in a further reinforcement of the belief that those races were inherently martial.[17]

Martial race theory was not a unified idea but drew upon local traditions and expressions of identity within Indian society, as well as British racial, ethnic, and historical theories.[18] It was malleable and evolved to the reality of the operational environment in India, as well as burgeoning forms of scientific racism and ethnography. A martial race would take an active role

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Century Colonial India," *Social Scientist* 43, no. 3/4 (April 2015): 50, https://www.jstor.org/stable/24372935.

[12] Farooqui, "'Divide and Rule'?" 53.

[13] Omissi, *The Sepoy and the Raj,* 35; Farooqui, "'Divide and Rule'?" 53.

[14] Streets, *Martial races*, 95.

[15] Ibid., 95.

[16] Omissi, *The Sepoy and the Raj*, 15.

[17] Streets, *Martial races*, 93.

[18] Arthur, "Martial Episteme," 154.

in maintaining their martial reputation, encouraging family members to enlist, enjoying the economic benefits of military service, and integrating or reinforcing military service as an honorable cultural artifact.[19] Martial race theory constantly evolved to reinforce its own validity, increasing the martial-ness of races who experienced operational success and decreasing the martial-ness of those who failed or fell out of favor with the British. Martial race theory became a legitimizing myth within the social hierarchy of the Indian military. This martial race social hierarchy suited the dominant groups within the hierarchy, first the British, then the martial races, as well as conveniently mirroring the caste hierarchy present in the broader Indian society.[20]

The British colonial administration used martial race discourse disguised the political functions of selective recruiting.[21] The Sepoy Rebellion of 1857 established those groups who remained loyal to the British administration as the foundation of martial race recruiting, with additional loyal communities added as the demand for soldiers grew.[22] Conversely, those communities considered rebellious or of questionable loyalty lost their martial status. The Bengali Hindus became a non-martial race due to their role in the Sepoy Rebellion and the Madras' martial characteristics 'degraded' after they failed to meet recruitment targets and languished in their garrisons in the more peaceful southern regions of India.[23] The operationalization of martial race theory had detrimental effects on Indian society and created artificial divisions between communities, as martial statuses changed and groups moved up and down the social hierarchy based on British assessments of those groups' martial prowess.

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[19] Omissi, *The Sepoy and the Raj,* 21; Arthur, "Martial Episteme," 156.

[20] Omissi, *The Sepoy and the Raj*, 15; Arthur, "Martial Episteme," 165; Jim Sidanius and Felicia Pratto, *Social Dominance: An Intergroup Theory of Social Hierarchy and Oppression* (Cambridge: Cambridge University Press, 1999), 46.

[21] Streets, *Martial races*, 179.

[22] Farooqui, "'Divide and Rule'?" 50.

[23] Omissi, *The Sepoy and the Raj,* 15; Streets, *Martial races*, 11.

As martial race theory became more entrenched in the Indian Army culture and the colonial administration policies, British officers ceased to think of soldiers as individuals, but as embodiments of their communities to which they belonged, including all the accompanying presumed martial and non-martial characteristics.[24] For British operational planners, this linear, compartmentalized view of Indian society, and the Indian Army, would result in unintended military and civil consequences. Through the contemporary lens of systems thinking, the British failed to understand how their martial race thinking was obscuring their view of the systems at work within Indian society and detrimentally oversimplified the complex interactions between social groups within that society.

The Indian Army and colonial administration had a significant influence on colonial policy across the British Empire for most of the 1800s and into the empire's decline during the post-world war era. British officers began their service in India and then migrated to service in the Middle East and Africa, taking martial race theory with them.[25] In both Africa and the Middle East, the British identified indigenous soldiers only by the characteristics attributed to their communities and not as individuals, a trait of martial race thinking that continues to be prevalent in contemporary operational planning. In the African context martial race theory considered all black communities as uniformly inferior for military service and creating as situation where military recruiters were "recruiting the best of the worst".[26]

Martial race theory in the Middle East was closer to that employed in India, where the loyalty of a community to the British colonial administration was the greatest instigator for the development of a narrative of martial prowess.[27] In both Africa and the Middle East, British

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[24] Farooqui, "'Divide and Rule'?" 51.

[25] Stoil, "Martial Race and Indigenous Forces," 167; W.R. Hay, *Two Years in Kurdistan: Experiences of a Political Officer 1918–1920* (London: Sidgwick and Jackson Ltd, 1921), 35-64; Anthony H. M. Kirk-Greene, "'Damnosa Hereditas': Ethnic ranking and the martial races imperative in Africa," *Ethnic and Racial Studies* 3, no. 4 (1980): 397, https://doi.org/10.1080/01419870.1980.9993313.

[26] Kirk-Greene, "'Damnosa Hereditas'" 172.

[27] Sopanit Angsusingha, "Aliens in Uniforms and Contested Nationalisms: The Role of the Iraq

operational planners continued to use their theory of martial race to detrimentally oversimplify complex systems and set themselves up for fundamental surprise in future conflicts. With the roots of contemporary conflicts planted squarely in the unintended consequences of the colonial era, contemporary operational planners must identify and remove any biases that encourage linear and compartmentalized analysis. Martial race thinking is a bias that persists.

Martial race theory was a sociological theory that morphed and expanded to the environmental context of the situation. In the naval version of martial race theory, British officers sought loyal communities who lived and worked near oceans to crew their ships and work their docks. Naval recruiters used the 'seafaring races' to build a nascent colonial naval fleet for regional support to the dominant but overstretched British Imperial Navy.[28] Like the land version, naval martial race theory continued to exclude the martial races from leadership positions, reinforcing the dominance of British at the top of the social hierarchy, followed by the naval martial races, and then the non-seafaring races.[29] By applying martial race thinking across domains, colonial operational planners inadvertently created mutually supporting feedback loops that supported martial race theory. When martial race theory failed to explain a phenomenon in one domain, it would prove superficially correct in another, and would be sustained through false comparisons and analogies.

By employing martial race thinking, colonial operational planners did not perceive the operational environment as a complex system composed of an interactive collection of communities. The martial races were linear, compartmentalized monoliths that perpetuated false analogies. The British believed that they understood the martial characteristics of Indian

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Levies in Shaping Aspects of Iraqi Nationalism under the British Mandate of Iraq (1921–1933)," (master's thesis, Georgetown University, 2018), 5, Georgetown University Institutional Repository; Stoil, "Martial Race and Indigenous Forces," 172.

[28] Daniel O. Spence, "Imperialism and identity in British colonial naval culture, 1930s to decolonisation," (doctoral thesis, Sheffield Hallam University, 2012), 336, http://shura.shu.ac.uk/20391/.

[29] Ibid., 337.

communities prior to 1857 and expected them to act in certain ways. They were fundamentally surprised when those communities rebelled.

As a result of martial race recruiting policies instituted after 1857, the martial races became more and more dependent on military service as an economic driver in their communities. Additionally, the cultural reinforcement of martial characteristics within these communities led to extreme specialization in, and dependence upon military employment for individual self-worth.[30] The martial orientation, and loyal service to the colonial administration, of the martial races set them at odds against the growing nationalist movement and those non-martial communities who represented the majority of the population of India.

Finally, the establishment of the social hierarchy of martial races, with the British on top, stunted the development of the Indian Army and created dependency and agency within the martial race communities. Martial race theory created a social hierarchy that became self-sustaining and exceptionally resilient to change despite the growing body of scientific evidence refuting it and operational experience of two World Wars disproving it. Martial race theory has transitioned from a kind of quasi-scientific theory to a strong cultural artifact within the Indian Army today.[31]

Martial race theory emerged at a time when ethnocentrism and racism were the same concept, ethnicity was race and race indicated ethnicity.[32] Martial race thinking manifests itself as a mixture of racial and ethnocentric assumptions and prejudices and does not fit neatly within either category. However, by considering martial race theory in its original context, it reflects another theory. In 1999, Dr. Jim Sidanius and Dr. Felicia Pratto published their book *Social Dominance Theory*, which aimed to integrate classical and contemporary theories of social

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[30] Spence, "Imperialism and identity," 52; *Regiment Diaries,* season 1, episode 1, directed by Tanuj Bhatia, aired August 16, 2018, India, https://www.netflix.com/title/81155880.

[31] *Regiment Diaries,* season 1, episode 1, directed by Tanuj Bhatia, aired August 16, 2018, India, https://www.netflix.com/title/81155880.

[32] Streets, *Martial races*, 93.

attitudes and intergroup relations into one coherent and comprehensive theoretical model.[33]

Analysing martial race thinking via social dominance theory provides a lexicon that more accurately describes the assumptions and prejudices that influence operational planners when they consider the operational environment, the military forces in that environment, and the people and groups who make up those forces.

Social dominance theory begins with the basic observation that all human societies tend to be structured as systems of group-based social hierarchies.[34] These social hierarchies are trimorphic in nature, consisting of age, sex, and arbitrary-set system. Socially constructed groupings based on characteristics such as race, ethnicity, caste, religious sect, and regional grouping fill the arbitrary-set system.[35] Martial race theory is an arbitrary-set system that has its own set of hierarchy-enhancing and hierarchy-attenuating forces, and legitimizing myths that enables a martial race structure to remain stable over time. At a micro level, martial race structures are relatively malleable as conflict directly disproves or reinforces previously held martial race assumptions. However, at a macro level martial race structures have proven exceptionally stable as demonstrated in the notable hierarchy enhancing legitimizing myths that elevate those groups who practice the "western" way of war as to be socially dominant over those who practice "non-western" ways of war.[36]

Martial race hierarchies draw their legitimizing myths from both racial and ethnocentric beliefs. Martial race thinking is racist thinking in that it privileges assumptions that hereditary and biological characteristics indicate martial prowess of individuals and groups over empirical data and combat records.[37] When recruiting operationalizes martial race theory, it creates racist policy

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[33] Sidanius and Pratto, *Social Dominance,* 31.

[34] Ibid., 31.

[35] Ibid., 33.

[36] Geoffrey Parker, "Introduction: The western way of war," in *Cambridge Illustrated History Warfare*, ed. Geoffrey Parker (Cambridge: Cambridge University Press, 1995), 2–11.

[37] Streets, *Martial races*, 93-96; Kendi, *How to be an antiracist*, 29.

by targeting certain groups for military service and excluding others, which have negative second and third order effects for both groups.[38] When the theory is operationalized it creates a distortion in the understanding of the operational environment. Planners segregate groups in their analysis along martial race designations, or they assimilate those groups into a martial race narrative that inflates their martial prowess.[39] Martial race thinking is also ethnocentric thinking in that it privileges assumptions that the dominant culture, values, and military traditions are superior indicators of martial prowess.

The subsequent sections of this monograph trace how martial race thinking affected British operations and is observable in the US and coalition operations that dominated the latter half of the 20th and early 21st century. While rarely classified as a formal theory or doctrine, European and North American military forces continue to employ martial race thinking, and elements of the theory, within the operations and campaigns they conduct.

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[38] Kendi, *How to be an antiracist*, 18; Streets, *Martial races,* 93; Michał Lubina, "Overshadowed by Kala: India-Burma Relations," *Politeja* no. 40 (2016): 439, www.jstor.org/stable/24920216.

[39] Kendi, *How to be an antiracist*, 24.

<div align="center">Case Studies</div>

Burma – 1939-1945

India officially incorporated Burma as a province in 1886 following the Third Anglo-Burmese War. This was a deeply humiliating experience for the Burmese as they had not only lost their independence, but also their national status in the colonial hierarchy.[40] As a result of incorporation, British administrators in Burma directly copied the colonial administration from India, complete with imported English-speaking Indians. The British created a "racial pyramid" that placed Europeans in control of all large-scale enterprises and Indians in the urban occupations and acting as middlemen. The "racial pyramid" restricted the Burmese majority to agriculture and the periphery of the colonial administration hierarchy when no other substitute was available.[41] This "racial pyramid" extended naturally to the colonial army responsible for security in the province of Burma.

British officers fully adhered to martial race theory as they recruited and organized regiments within Burma. They believed that ethnic minorities from the frontier regions of Burma were hardier and more loyal than the lowland Burman farmer. As in India, loyalty was a driving factor for the British in determining which races were martial. The British recruited the Karens to help overthrow the Burmese king in 1885, making them the first of the martial races of Burma. British recruiters began recruiting Chins and Kachins later as the requirement for manpower increased.[42]

The British also used religious beliefs and racial characteristics for to identify the martial races of Burma. The Karens were most favored as they were fair skinned and had converted to

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[40] Lubina, "Overshadowed by Kala," 439.

[41] Ibid., 445.

[42] Andrew Selth, "Race and Resistance in Burma, 1942–1945," *Modern Asian Studies* 20, no. 3 (1986): 488, https://www.jstor.org/stable/312534.

Christianity. The Kachins were Animists, a separate religious view from the majority of Burmans, and were very much like Gurkhas in appearance. Finally, the Chins were from the mountainous border with India, which was a strong geographic indicator of martial characteristics, but were of darker complexion and thus believed to be less easy to handle.[43]

Starting in 1886, the effects of martial race recruiting policies slowly excluded the Burman majority from military employment, as they had been from the civil administration and the economic elite. Martial race theory was completely institutionalized in the Burmese colonial army by 1925, with the adoption of an official policy of recruiting only Chins, Kachins, and Karens.[44] With the outbreak of the Second Sino-Japanese War and the expansion of the Japanese Empire westward, large scale combat operations would test the British colonial forces, recruited and organized in accordance with martial race theory, on their home soil.

The British had directly observed the Japanese military victories during the first Sino-Japanese War but remained unconvinced that the Japanese demonstrated any threat to a European army. The non-martial Japanese army had unimpressively defeated the even less martial Chinese forces.[45] As the Japanese campaign of conquest gained momentum on the eastern front of the empire, British intelligence and operational leadership struggled to understand the new threat while simultaneously preparing for a defense of the colonies. Some experts at the strategic level in the British military took note of the military victories and operational experience being gained by the imperial Japanese army as they conquered China and southeast Asia. However, operational

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[43] J.D. Lunt, "The Burma Rifles," *Journal of the Society form Army Historical Research* 76, no. 307 (Autumn 1998): 203, https://www.jstor.org/stable/44230134.

[44] Matthew J. Walton, "Ethnicity, Conflict, and History in Burma: The Myths of Panglong," *Asian Survey* 48, no. 6 (December 2008): 894, https://www.jstor.org/stable/10.1525/as.2008.48.6.889.

[45] John Ferris, ""Worthy of some better enemy?": The British Estimate of the Imperial Japanese Army, 1919–41, and the Fall of Singapore," *Canadian Journal of History* 28, no. 2 (Summer 2016): 231, https://doi.org/10.3138/cjh.28.2.223.

staff and tactical leaders on the ground in Burma, Singapore, and the Malay Peninsula rejected this relatively balanced assessment.[46]

The British officers leading the colonial armies and British garrisons were a product of martial race dogma at the height of its influence in the region. These officers could not believe that they would be defeated by an incompetent, unintelligent, and distinctly un-martial race. They both underestimated the Japanese and overestimated themselves, resulting in shock when the Japanese beat the British and their martial races into the longest retreat in British history.[47] Martial race thinking had led British operational planners to oversimplify the complex operational environment into linear, compartmentalized monoliths. This oversimplification led to hubris and unpreparedness, which resulted in the unnecessary loss of life, tactical defeat, and almost cost the allies a second front in the Pacific theater.

In response to the fundamental surprise of Japanese martial prowess, British operational planners did not reject martial race thinking, but adjusted their monolithic compartmentalization of Japanese martial qualities to a point of reverence for their enemy. As Field-Marshal Viscount Slim described in his memoirs: "We began by despising our Japanese enemy; the pendulum the swung wildly to the other extreme. We built up our enemy into something terrifying, as soldiers always will to excuse their defeats, and frightened ourselves with the bogy of the superman of the jungle."[48] The British were continuing to view the actors in the operational environment through a martial race lens with the Japanese rising to the apex, supplanting British superiority, and crushing the morale of the British forces.

Fundamental surprise and collapse in the face of a determined Japanese enemy was not the only negative operational outcome brought on by martial race thinking and its

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[46] Ferris, ""Worthy of some better enemy?" 238.

[47] Ibid., 230.

[48] William Slim, *Defeat into Victory: Battling Japan in Burma and India, 1942–1945* (London: Cooper Square Press, 2000), 539.

operationalization within the colonies. British forces and their martial races had to retreat through territory populated by the disenfranchised, 'non-martial' Burmese who were ambivalent, if not hostile to retreating British colonial forces.[49] To further aggravate the situation, martial race recruiting had built a force divided along racial and ethnic lines, internally competitive with one another, and with minimal collective training between regiments. The internal racial tensions and inexperience caused challenges in leadership, administration, and supply during one of the most challenging operations of the war.[50]

Activists, military professionals, and politicians challenged martial race thinking as the Second World War drew on. The Indian Army informally abandoned martial race recruiting in 1941 in the face of the Japanese onslaught.[51] Operational experience debunked the beliefs that units needed to be racially pure to fight well, that only Europeans could lead in battle, and that the Japanese were supermen.[52] Even divisions between castes and religions that were endemic in broader Indian society were overcome amongst Indian soldiers living, fighting, and dying together.[53] In Africa, martial race recruiting created ethnically homogenous constabulary armies in each of the colonies.[54] Where there was conflict with Axis powers, the Indian Army units, composed of martial races, reinforced those colonies.[55] However, when the African, Indian, and British forces gained operational experience together, martial race thinking broke down and

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[49] Slim, *Defeat into Victory*, 46; Lubina, "Overshadowed by Kala," 447.

[50] Slim, *Defeat into Victory*, 539; Barkawi, "Peoples, Homelands, and Wars?" 149.

[51] Omissi, *The Sepoy and the Raj,* 43.

[52] Lubina, "Overshadowed by Kala," 447; Slim, *Defeat into Victory*, 539; Kirk-Greene, "'Damnosa Hereditas'" 397.

[53] Lubina, "Overshadowed by Kala," 147.

[54] Kirk-Greene, "'Damnosa Hereditas'" 405.

[55] Kaushik Roy, "Expansion and Deployment of the Indian Army during World War II: 1939–45," *Journal of the Society for Army Historical Research* 88, no. 355 (Autumn 2010): 259, https://www.jstor.org/stable/44231771.

comradery and cooperation increased in the face of a common enemy, the same lessons that allied

forces had observed in Burma.[56]

Upon the cessation of hostilities, the allied armies quickly fell back into martial race

thinking and traditions. Newly nationalist India pressed for reform, but eventually acquiesced to

keeping "the professional ethos, 'martial races', Gurkhas and all," of the colonial army that they

were about to inherit, demonstrating the influence and resilience of martial race as a social

hierarchy.[57] As in India and Burma, martial race hierarchies in Africa regained influence at the

conclusion of the Second World War. Those hierarchies would be challenged as Africa began

decolonizing, resulting in tragic outcomes and even greater division.[58]

Despite the resounding flaws and failures exposed by combat operations, martial race

dogma persisted as a social hierarchy that could not be fully torn down or remade. Those with

agency in martial race policies created new legitimizing myths to validate the martial races'

primacy in the military institution. Military leaders suppressed intelligence and operational

failures under the blanket of victory over the Japanese.[59] Martial race thinking regained its

position of influence upon the visualization of the strategic and operational environment. A new

social hierarchy of martial races was being established alongside the new world order, with

America and her western European allies at the pinnacle.

Martial race thinking oversimplified a complex system. The result of that

oversimplification was fragility in the military force that had been constructed and employed in

accordance with martial race theory. When large-scale combat tested that military force, it

experienced unnecessary losses of lives and equipment from its initial tactical and operational

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[56] Stoil, "Martial Race and Indigenous Forces," 170; Kirk-Greene, "'Damnosa Hereditas'" 408.

[57] Omissi, *The Sepoy and the Raj,* 242.

[58] Kirk-Greene, "'Damnosa Hereditas'" 409.

[59] John W. Dower, *War Without Mercy*, (New York: Pantheon Books, 1986), 351-61, Adobe Digital Editions EPUB.

losses and narrowly avoiding strategic defeat. While the allies achieved the end-state of victory in the Pacific, martial race thinking had established conditions in the operational environment that would lead to racial strife across the theater, which would result in violence and civil unrest that persists to the present.

Korea – 1945-1953

While India was grappling with decolonization, desegregation, and dismantling of martial race systems in the Indian Army, the United States was beginning their own desegregation process across their society. Martial race theory was never formally adopted by the US military establishment, but the racial science that underpinned martial race theory was present. The class-regiment style organization of segregated units, and the employment of "inferior" races in non-combat and lower profile area-security operations all demonstrate a prevalence of martial race thinking and operationalization.

For the African American community, entry into military service followed a similar path to the non-martial races in India. When an impending military threat pressed the military establishment to increase its manpower, military leaders suppressed racist beliefs of black martial inferiority in the face of necessity and the Union Army began to recruit African American soldiers.[60] Following the Civil War, African American veterans assumed places of prominence within their communities, they helped to establish the first black colleges, black orators and ministers extolled them as examples of courage, loyalty, and skill to the youth, and their service was fully commemorated in books and pamphlets.[61] Military service quickly became a path to prominence and success versus the low social standing of black males in American society, much in the same way that the Sikh and Gurkha communities of India found value and purpose in military service.

Segregation of Black, Hispanic, Filipino, Asian, and American Indian soldiers from white soldiers was policy from the Civil War until the beginning of the Korean War. Segregation took on various forms, similar to the class-regiment system employed in India, with some races

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[60] William T. Bowers, William M. Hammond, and George L. MacGarrigle, *Black Soldier, White Army: The 24th Infantry Regiment in Korea* (Washington, DC: Center of Military History, United States Army, 1996), 3.

[61] Ulysses Lee, *The Employment of Negro Troops* (Washington, DC: Center of Military History, United States Army, 2001), 4.

allowed to employ officers of their own race, others only led by white officers, and all of them restricted to employment in non-combat or menial security tasks due to their perceived non-martial qualities.[62]

In operations during the Spanish-American War, the Great War, and the Second World War, segregated units faced the same martial race thinking that each previous generation had disproved. Despite evidence of segregated units achieving equal or better operational successes in battle, these portions of history would be forgotten or suppressed and the martial race hierarchy, with white soldiers at the apex, would be re-established during the interwar periods.

Theodore Roosevelt praised the contributions of his black soldiers in Cuba, then later attributed those accomplishments almost completely to the leadership of white officers.[63] During WWI, the American news media lauded the segregated units' early operational successes, but by the end of the conflict, prominent general officers were deriding the martial characteristics of non-white soldiers and disqualified them from combat duties.[64] Finally, during the Second World War, General MacArthur defended the 93d Division's record in the Pacific theater and stated, "that race and color have nothing whatever to do with fighting ability." Yet four years later General George C. Marshal would assert that the 93d Division "wouldn't fight–couldn't get them out of the caves to fight."[65]

Despite documented operational successes, racial hierarchy-enhancing legitimizing myths of the inferiority of non-white soldiers continued to propel military thought to a martial race social hierarchy. Like the evolution of martial race thinking in India, the US Army only changed its recruiting and employment policies of non-white, read non-martial, soldiers due to manning

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[62] Bowers et al., *Black Soldier, White Army,* 20–23; Gilberto N. Villahermosa, *Honor and Fidelity: The 65th Infantry in Korea, 1950–1953* (Washington DC: Center for Military History, United States Army, 2009), 19.

[63] Bowers et al., *Black Soldier, White Army,* 12.

[64] Lee, *The Employment of Negro Troops*, 15.

[65] Bowers et al., *Black Soldier, White Army,* 23.

shortages during major conflict and in response to the political lobbying of the non-martial communities for equal opportunity to fight the nation's wars.[66]

 At the conclusion of the Second World War, martial race thinking and the social hierarchy that accompanies it was well established in the US Army. Having just won the war in the Pacific, white American soldiers occupied the apex of the martial hierarchy. The vanquished Japanese rated just below white American forces as a worthy foe who had fought hard but lost.[67] The segregated non-martial races of the US Army were equal to or lesser than the Japanese, and finally the hapless Asian races who had to be rescued by the American forces were non-martial or required significant cultural development to regain any martial prowess.[68] In American liberated South Korea, this martial hierarchy led to critical missteps by the US military administration as it sought to re-establish government control and the security apparatus in the face of Russian competition to the North.

Martial race thinking led to the American forces making their first critical mistake in administering the occupied areas of Korea. By relying on the established Japanese administrators and Japanese-trained security forces in Korea and excluding the Provisional Government of Korea, which was in China, US forces alienated Koreans from the nascent military forces that were meant to protect Korea.[69] Lieutenant-General John R. Hodge, commander of US military forces in occupation of the area below the 38th parallel from 1945-48, was the greatest proponent of these policies. Advised by experts in Washington and informed by his own prejudices towards

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[66] Bowers et al., *Black Soldier, White Army,* 15.

[67] Dower, *War Without Mercy*, 372-73.

[68] Charles Kraus, "American Orientalism in Korea," *The Journal of American-East Asian Relations* 22, no. 2 (2015): 150, https://www.jstor.org/stable/43898414.

[69] Chung Kyung Young, "An analysis of ROK-US Military Command Relationship from the Korean War to the Present" (master's thesis, Command and General Staff College, 1989), 18, Ike Skelton Combined Arms Research Library Digital Library.

Koreans, General Hodge maintained this approach until the eve of the outbreak of hostilities with the North and in the face of public and private protests by Korean citizens.[70]

Racial and ethnocentric prejudices were widespread amongst American senior leaders and soldiers alike, which reinforced their martial race view of their Korean allies. The American forces developed their martial race theory of Korea based upon their own personal racist views and their assessment of the martial prowess of races by their performance during the Second World War. US advisors were responsible for training and establishing the Republic of Korea armed forces and consistently clashed with their Korean counterparts on matters of 'face' and moral obligations.[71]

The wife of a US officer of the occupying forces observed that Americans were "arrogant and contemptuous of everything Korean" which led to continued distrust, misunderstanding, and low morale between American and Korean forces leading up to the outbreak of hostilities with the North.[72] The negative interactions between American and Korean soldiers during the occupation created a negative feedback loop within the martial race hierarchy.[73] These negative interactions reinforced the narratives of the martial superiority of the Americans and the inferiority of the Koreans. The negative feedback loop drove the system back to the general martial race theory that was active within the operational environment. US military leadership and soldiers perpetuated this martial race thinking until operational experience stripped away racial and ethnocentric prejudices.[74]

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[70] James I. Matray, "Hodge Podge: American Occupation Policy in Korea, 1945–1948," *Korean Studies* 19 (1995): 23, http://www.jstor.com/stable/23719137.

[71] Young, "An analysis of ROK-US Military Command," 20.

[72] Matray, "Hodge Podge," 20.

[73] Everett C. Dolman, *Pure Strategy: Power and Principle in the Space and Information age* (New York: Routledge, 2005), 123.

[74] Matray, "Hodge Podge," 20; Villahermosa, *Honor and Fidelity*, 34-35.

While American forces had a low opinion of their allies in Korea, they held their North Korean and Chinese enemies in even lower esteem. General MacArthur described both North and South Korean forces as being in the nature of a "border guard" in 1950.[75] The General and his staff demonstrated martial race thinking in their assessment of North Koreans being as poorly suited for military operations as the South Koreans, despite intelligence that North Korean forces were building significant military capability and capacity in 1949. Between MacArthur and his intelligence chief Willoughby, this view of North Korean military capabilities greatly confused intelligence assessments throughout the American intelligence enterprise, as Tokyo was now the single source for intelligence in the theater. After the North Koreans had successfully invaded the south, MacArthur described them as "professionally worthy of the highest admiration… as smart, efficient, and able a force" as he had ever seen in the field.[76] MacArthur and his staff's contempt for, and then admiration of, their North Korean enemies echoes the experience of British Officers in Burma just ten years prior.

MacArthur and his staff would continue to underestimate their opponents with their assessment of the Chinese forces. Major General Willoughby harbored a martial race view of the Chinese as an inferior fighting force throughout most of his career in the US military.[77] Additionally, Willoughby continued to shape the intelligence picture to fit MacArthur's preferred future, denying that the Chinese were intervening up until it was far too late to react. Willoughby was not alone in this view, Major General Almond, commander of X Corps, would not believe he was being defeated by Chinese forces until he went and saw them himself, even then deriding them as "Chinese laundrymen" and diminishing their martial prowess.[78] The strongly held

[75] H.A. DeWeerd, *Strategic Surprise in the Korean War* (Santa Monica: The RAND Corporation, 1962), 9, https://apps.dtic.mil/sti/pdfs/AD0612431.pdf.

[76] Ibid., 9.

[77] Justin M. Haynes, "Intelligence Failure in Korea: Major general Charles A. Willoughby's role in the United Nations Command's Defeat in November, 1950" (master's thesis, Command and General Staff College, 2009), 107-109, Ike Skelton Combined Arms Research Library Digital Library.

[78] Bob Rielly, *Defeat from Victory: Korea 1950* (Fort Leavenworth, KS: US Army Command and

martial race views discounting Chinese martial ability, courage to act, and determination in the face of American soldiers were proven false and paralyzed the senior American commanders at a decisive battle in the war.

With the outbreak of hostilities, the United Nations established a force, led by the United States, and began the movement and staging of the international contingent at Pusan, Korea. This was the first foreign intervention of a UN force and the first major test of the organization's ability to re-establish peace and enable world order.[79] For Korea, each country contributed forces as an equal partner and represented their nation both in operations in Korea and as a strategic lever in the jockeying for influence within the United Nations and the broader post-war world order.[80]

Initially, US leadership viewed their coalition partners through a martial race lens and integrated them into the martial race social hierarchy already established in the theatre. Forces of predominantly white, northern European soldiers from England, Canada, and Australia were independently commanded in their own formations under overall US command and assumed their position of prominence close to white US forces at the apex. US military leadership subordinated forces from non-Anglo and non-European states to US combat units for command and control, but the pairing of units also indicates an initial martial race view of each country's force.

Consideration was made for strength of unit, equipment, training, and national caveats from higher headquarters. However, American operational planners considered characteristics of "natural aggressiveness" and "soldierly steadfastness" when assigning UN forces to offensive or

General Staff School, 2019), 13.

[79] William J. Fox, "History of the Korean War: inter-allied co-operation during combat operations," 15 August 1952, pages 2-3, General Military History, N17055.95-A, Combined Arms Research Library Digital Library.

[80] John M. Vander Lippe, "Forgotten Brigade of the Forgotten War: Turkey's Participation in the Korean War," *Middle Eastern Studies* 36, no. 1 (January 2000): 92–93, https://www.jstor.org/stable/4284053.

defensive missions, indicating an early martial race view of those forces.[81] The largest non-white, non-Anglo units were the Turkish brigade and Philippine battalion combat team attached to the 25th Infantry division, which was also home to the only black segregated unit.[82]

The historical records of the Turkish and Filipino combat actions are full of romantic stories of courage and hardiness.[83] However, those records hide the fact that US operational planners and leaders employed these forces in much the same way as the all-black 24th Infantry Regiment, as rear-guard or shock forces, relatively expendable either way, and with their American commanders giving them limited attention.[84] Those formations who treated their segregated US units and non-European units as inferior martial races suffered from poor moral and a lack of cohesion. This situation was not corrected until General Ridgway and his staff undertook a major reassessment of leadership and employment policies in January 1951.[85]

In the occupation period leading up to the Korean War and its initial stages, a martial race view of military forces in the theater of operations distorted the senior leadership's understanding of the operational environment. Internally, a martial race hierarchy of US and coalition forces led to the inefficient use of resources and a detrimental effect on moral and formation cohesion. Externally, North Korean and Chinese forces surprised US and UN forces with their military actions, capabilities, and professionalism. The results were high casualties, a decisive retreat from North Korea, and an almost fatal blow to morale and cohesion across the UN force.

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[81] Fox, "History of the Korean War," 57.

[82] Ibid., 62.

[83] Mesut Uyar and Serhat Güvenç, "One Battle and Two Accounts: The Turkish Brigade at Kunu-ri in November 1950," *Journal of Military History* 80 (October 2016): 1141, https://www.researchgate.net/publication/309482419; Villahermosa, *Honor and Fidelity*, 19.

[84] Uyar and Güvenç, "One Battle and Two Accounts," 1141.

[85] Thomas Bradbeer, *Eighth Army Fights Back* (Fort Leavenworth, KS: US Army Command and General Staff School, 2019), 23.

US and UN forces eventually recovered from these initial errors. General Ridgway would take command of 8th Army and eventually all UN forces. Ridgway, his subordinate commanders, and his UN partners would be instrumental in reforming the UN force into a cohesive fighting force, overcoming martial race views between national contingents, and leading the way in desegregation of the US Army while conducting combat actions.[86]

The realities of conflict have disproven martial race thinking on numerous occasions and yet the social hierarchies continue to reconstitute and persist following those conflicts. In Korea, history depicts the combat record of the Turkish brigade as one full of fierce warriors and cunning leadership, yet the record greatly diminishes the confusion and chaos of the actual battles.[87] Conversely, the heroism and loyalty of black American soldiers was suppressed by a narrative of cowardice and laziness in the historic record to protect the reputation of white officers leading segregated units.[88] In many ways, history has not been the cure for martial race thinking, but has perpetuated the legitimizing myths that support the hierarchy. As in India and Burma, external pressure to reform has had the greatest impact on changing martial race views. Those military professionals within the system, especially those with the most experience, appeared to fall prey to martial race thinking with the greatest consequences.

The Korean War highlights the pitfalls of martial race thinking at all levels within the US and United Nations military commands. The initial martial race view of North and South Korean, and Chinese forces led to linear, compartmentalized views of the actors within the operational environment. These errors were compounded when US operational planners made hasty generalizations of their partner forces as part of the integration process at the UN reception center at Pusan, Korea. The initial errors of viewing the operational environment as a collection of linear, compartmentalized pieces acting upon one another in a predicable manner resulted in

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[86] Bradbeer, *Eighth Army Fights Back,* 23; Bowers et al., *Black Soldier, White Army,* XIV.

[87] Uyar and Güvenç, "One Battle and Two Accounts," 1147.

[88] Lee, *The Employment of Negro Troops*, 188.

fundamental surprise when Chinese and North Korean forces broke the UN, US, and South Korean forces near the Yalu River. The subsequent tactical defeats, and significant loss of lives and equipment, relented only when the Chinese and North Korean forces outran their operational reach capabilities. UN and US forces did not enjoy success again until General Ridgway and his team adopted what a contemporary planner would recognise as a systems approach to structuring and employing their forces, rejecting martial race thinking, and integrating their force into formidable fighting units. However, the martial race legacy of Korea remains at the 38th parallel, where the end state and conditions remain unresolved despite great sacrifices made during the Korean War.

Iraq – 2003-2011

Military leaders developed martial race theory in a constabulary security environment in India, but it was applied in an environment characterized by great power competition in the Levant. England and France sought to consolidate gains at the end of the First World War by leveraging their local alliances and establishing a security environment that ensured their continued influence in the region. Martial race theory heavily influenced both colonial powers in this endeavor.

The British imported martial race theory through their Indian army, which was heavily involved in defeating the Ottoman forces. T.E. Lawrence and his peers helped lay the cognitive foundations of a Middle Eastern martial race hierarchy during the Arab Revolt. Lawrence favored the rugged tribesmen of the desert over the "debased Arabs of the city."[89] He also strongly preferred the *pure Arab* over Egyptians, Turks, and Syrians, demonstrating a hierarchical view of the martial races of the Levant based on perceived biological indicators.[90]

British officers blended Lawrence's views with their own understanding of martial race theory as they sought loyal races to build constabulary military forces. In line with agreements made between the Hashemite family and Lawrence during the Arab Revolt, Sunni Bedouin tribes loyal to the Hashemite royalty made up the majority of the post-First World War Iraqi army. The British recruited Assyrian levies as a constabulary force to protect their specific military interests in Iraq, separate from the Iraqi army. The Assyrian levies met the hallmarks of British marital race theory. The British perceived them to be a pure race of rural, rugged men who valued military service in their own culture. They proved loyal to the British, and readily turned against the broader Arab and Kurdish population when required.[91]

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[89] Jeffrey Meyers, "T.E. Lawrence and the Character of the Arabs," *The Virginia Quarterly* 80, no.4 (Fall 2004): 140, https://www.jstor.org/stable/26439724.

[90] Ibid., 145.

[91] Daniel Silverfab, *Britain's Informal Empire in the Middle East: A Case Study of Iraq, 1929–1941* (New York: Oxford University Press, 1986), 47; Simon Jackson, "Arming the Kurds builds on long

The British approach to the Kurdish people was more nuanced. British officers who operated within the region considered the Kurds a martial race.[92] However, the Kurds were constantly at odds against British authority and influence, making them unsuitable for direct recruitment as a martial race like the Assyrians. The British did leverage the martial prowess and desire for autonomy of the Kurds as a counterbalance to Arab nationalism in Baghdad, ensuring an enduring need from both sides for British influence in Iraq.[93]

The European approach to colonialism in the Levant points to an overarching martial race view that has persisted into the contemporary operational environment. Europeans believed the Arab races of the Levant to be inherently non-martial, unamenable to discipline, and unable to meet the standards of European soldiers.[94] This is evident in the use of martial race theory to create indigenous security forces to retain control, and in the fundamental surprise that European leadership experienced when the Arab Revolt achieved success against the Ottoman Empire.[95] The latter example is particularly controversial as the British celebrated T.E. Lawrence, a white European officer, as critical to the success of the Arab Revolt, diminishing the Arabs, who did the fighting and dying, in the martial hierarchy of the region.

Despite the decline of British political influence after the demise of the Hashemite monarchy in 1958, the martial race hierarchy survived mostly intact due to the power it afforded Saddam Hussein and his predecessors to control their countries. While Europeans no longer held

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history of proxy warfare in the Middle East," *The Conversation*, September 16, 2014, accessed January 15, 2021, https://theconversation.com/arming-the-kurds-builds-on-long-history-of-proxy-warfare-in-the-middle-east-31648.

[92] Hay, *Two Years in Kurdistan*, 35-64.

[93] Saad Eskander, "Britain's Policy in Southern Kurdistan: The Formulation and the Termination of the First Kurdish Government, 1918–1919," *British Journal of Middle Eastern Studies* 27, no.2 (November 2000): 145, https://www.jstor.org/stable/826089.

[94] Stoil, "Martial Race and Indigenous Forces," 169.

[95] Silverfab, *Britain's Informal Empire in the Middle East,* 47; Efraim Karsh and Inari Karsh, "Myth in the Desert, or Not the Great Arab Revolt," *Middle Eastern Studies* 33, no. 2 (April 1997): 297, https://www.jstor.org/stable/4283869.

the apex, the Sunni Bedouin had taken their place. This itself was a result of the impact of martial

race theories on the region. Saddam Hussein recruited his personal bodyguard and his senior

security officials exclusively from the Al-bu Nasir, the Jubbur, and the Ubayd tribes due to their

loyalty, their Arab pure-ness, and their tribal values of communal spirit, honor, and manly

valor.[96] The Sunni Bedouin from the Tikrit region had become Saddam's preferred martial race

for protection against the multi-ethnic Iraqi army and the Kurdish and Shi'ite tribal militias.[97]

To retain power, Saddam Hussein balanced a pan-Arab Iraqi nationalism with a tribal,

sectarian competitive rewards system that the martial race hierarchy and recruiting policy was

essential to sustaining.[98] He managed to maintain the martial hierarchy despite unprecedented

upheaval of a war with Iran and America through the 1980s and 1990s. By the time that America

and its coalition partners had toppled Saddam Hussein's government in 2003, the martial race

hierarchy had not changed significantly since the British mandate at the end of 1920. To their

detriment, the coalition completely adopted the legacy martial race hierarchy as they began

consolidation and reconstruction operations in Iraq.[99]

Upon the official completion of combat operations in Iraq on May 1st, 2003, the US

Department of Defense and State Department began efforts to re-establish Iraqi government and

security services within the country. The seize initiative and dominate phases of Operation Iraqi

Freedom had gone relatively to plan and in line with American and British martial race thinking

for the theatre of operations. To the US civilian and military leadership, the defeat of Iraqi forces

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[96] Amatzia Baram, "Neo-Tribalism in Iraq: Saddam Hussein's Tribal Policies 1991–96," *International Journal of Middle East Studies* 29, no. 1 (February 1997): 5, https://www.jstor.org/stable/163849.

[97] Baram, "Neo-Tribalism in Iraq," 5; Fouad Ajami, "The American Iraq" *Wall Street Journal*, January 30, 2007, accessed December 20, 2020, https://www.wsj.com/articles/SB117012900271492074.

[98] Baram, "Neo-Tribalism in Iraq," 19.

[99] Jean F. Godfroy, Matthew M. Zais, Joel D. Rayburn, Frank K. Sobchack, James S. Powell, and Matthew D. Morton, *The U.S. Army in the Iraq War – Volume 1: Invasion – Insurgency – Civil War, 2003–2006* (Carlisle, PA: Strategic Studies Institute and U.S. Army War College Press, 2019), 43.

was a foregone conclusion.[100] The Department of Defense was enamored with what they had achieved in Afghanistan with minimal special operations forces on the ground and a high-tech air campaign, and their expectations were being met in Iraq.[101] Finally, the Iraqi forces lacked the "human factor" to be able to withstand almost any military force, as they had lost to the Kurdish rebels, the Israelis, the Iranian army, and the United States.[102]

The Kurdish Peshmerga had played their role as a traditional martial race, providing loyal support to superior British and American forces, while defeating Iraqi resistance in localized tactical victories.[103] The Sunni dominated Iraqi army put up some resistance to coalition forces but were no match against American and British military superiority, much as they had been during the first Gulf War in 1991.[104] Finally, the coalition had liberated the non-martial Shi'ite majority, and the expatriated Shi'ite technocrats and politicians were returning to assist in rebuilding Iraq.[105] However, the model of the martial race hierarchy that US forces were employing during planning and combat operations broke down just as significant changes to the coalition force posture and civilian and military leadership took effect.

A hallmark of martial race theory is thinking of individuals only in reference to their ethnic or racial traits, as representative of a monolith, and not an individual. In May 2003, the Coalition Provisional Authority, led by Ambassador Paul Bremer, his advisors, and senior leadership at Department of Defense, made an inappropriate analogy between Sunni Ba'athism

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[100] Cullen Murphy and Todd S. Purdum, "Farewell to All That: An Oral History of the Bush White House," *Vanity Fair,* February 2009, accessed February 15, 2021, https://www.vanityfair.com/news/2009/02/bush-oral-history200902.

[101] Ibid.

[102] C. Anthony Pfaff, *Professionalizing the Iraqi Army: US Engagement after the Islamic State* (Carlisle, PA: Strategic Studies Institute and U.S. Army War College Press, 2020), 2.

[103] Michael Rubin, "Is Iraqi Kurdistan a Good Ally?" *American Enterprise Institute* no.1 (January 2008): 2, https://www.jstor.org/stable/resrep03021.

[104] Godfroy et al., *The U.S. Army in the Iraq War – Volume 1,* 103.

[105] Ibid., 157.

and German Nazism.[106] This false analogy led operational planners to reinforce the martial race view that Sunnis were inherently more martial than the other groups active in Iraq, and disproportionately focused security policy and resource efforts towards controlling that population.[107] By viewing the operational environment as linear and compartmentalized, dominated by "Nazi" Sunnis, "loyal" Kurds, and "liberated" Shi'a, the US planners were overlooking a growing threat in southern Iraq.

In the spring of 2004, coalition forces engaged in a one-front counter insurgency against Sunni militias while Moqtada al-Sadr agitated Shi'a militias by endorsing violence against coalition forces.[108] Martial race thinking again caused a distorted view of the operational environment. Having twice recommended against operations to address the threat that Sadr and his militia posed, Lieutenant General Sanchez, Commander of Coalition Ground Forces in Iraq, was pressed again by Secretary of Defense and Coalition Provisional Authority to act in April of 2004.[109]

This time General Sanchez believed he could conduct operations against Sadr and handle the potential backlash of protests and local violence by Sadr's Shi'a followers.[110] Sanchez described the failure in assessment and the outcome in his memoirs *Wiser in Battle*: "Overall, the fighting was intense and bloody… During the first few days of this Shi'a rebellion, it became painfully clear that our intelligence assessments concerning Muqtada al-Sadr's resolve and

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[106] Godfroy et al., *The U.S. Army in the Iraq War – Volume 1,* 141-162.

[107] W. Andrew Terrill, *Lessons of the Iraqi De-Ba'athification Program for Iraq's Future and the Arab Revolutions* (Carlisle, PA: Strategic Studies Institute and U.S. Army War College Press, 2012), 60; Godfroy et al., *The U.S. Army in the Iraq War – Volume 1,* 133.

[108] Godfroy et al., *The U.S. Army in the Iraq War – Volume 1,* 283.

[109] Ibid., 217.

[110] Ricardo S. Sanchez, *Wiser in Battle: A Soldier's Story* (New York: HarperCollins e-books, 2008): 334, Adobe Digital Editions EPUB.

capabilities were terribly wrong. We had underestimated the enemy and were now paying the price for that failure."[111]

Coalition forces had bought into the legacy martial race hierarchy of Sunnis as the most martial, Kurds as a martial counterbalance to the Sunnis, and the Shi'ites as a non-martial majority to be liberated. By viewing the operational environment as inhabited by monolithic groups with inherent martial characteristics, the US forces we unprepared to address the consequences of Shi'ite violence which would boil over into a civil war between Sunni and Shi'ite Iraqis, with US forces stuck in the middle.

Characteristics of martial race thinking continued to be evident in the US approach to counter-insurgency in Iraq. The Anbar Awakening and enlistment of Sunni fighters into the Sons of Iraq was initially hailed as a masterstroke by US counter-insurgency experts.[112] However, US policies that support to the recruitment, equipping, and training efforts of a Sunni dominated Sons of Iraq and a Kurdish dominated Peshmerga mimics the caste-regiment recruitment and training system used to establish the martial races in India.

Utilizing the caste-regiment recruiting approach for Sons of Iraq and Peshmerga diminished the sectarian tensions and the lower moral that was experienced in the multi-ethnic Iraqi Security Forces, but also overlooked the political divisions that these ethnically aligned forces perpetuated. The US withdrawal in 2011 ended their support to the Sons of Iraq program, leaving those political divisions to be exploited. By 2014, many US trained Sons of Iraq members had joined the Islamic State of Iraq and Syria forces, and the Kurdish nationalist movement, bolstered by the Peshmerga, was stronger than ever.[113]

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[111] Sanchez, *Wiser in Battle,* 336.

[112] Sibylle Scheipers, "Auxiliaries at War in the Middle East," *Survival* 57, no.4 (September 2015): 130, https://doi.org/10.1080/00396338.2015.1068569.

[113] Scheipers, "Auxiliaries at War in the Middle East," 131; "The Kurd's Quest for Independence: 1920 – 2021," Timeline, Council on Foreign Relations, last modified February 16, 2021, accessed February 16, 2021, https://www.cfr.org/timeline/kurds-quest-independence.

Martial race thinking led to operational errors in the early days of the Iraqi insurgency and civil war, creating a volatile situation that US forces were ill-prepared to address. Unlike the European and American leadership in Korea and Burma, no American commanders or civilians in Iraq demonstrated an overtly racist view of specific groups, or the Iraqis as a whole. Instead, there appears to be an institutional momentum that accepted the legacy martial race hierarchy and legitimizing myths that had characterized Iraqi military history.

Leadership then fell prey to a confirmation bias that resulted in poor operational decisions. The Sunnis had supported Saddam, fought the coalition, and according to the coalition leadership must be purged from the government and security forces for the coalition to triumph over evil. The coalition liberated the Shi'ites, and while the Shia demonstrated localized and small-scale violence, they perceived them unwilling and incapable of organized resistance against the coalition and Iraqi government's will. Finally, in the coalition's mind the Kurds resumed their role as martial counterbalance to the Sunni ruling class and in resuming that role, reignited expectations of a path towards sovereignty. In all three cases, many poor decisions and complex factors led to poor operational outcomes but working from a legacy martial race view significantly contributed to the surprise experienced by coalition forces when their enemies and partners reacted in unexpected ways.

As in Burma and Korea, coalition operational planners failed to fully understand the complexity at work within the operational environment in Iraq due to the linear and compartmentalized analysis that martial race thinking encourages. These linear and compartmentalized views of Iraq, held primarily by the most senior civilian and military leadership, led to hubris and a lack of planning for follow-on operations that led to catastrophic success. That catastrophic success led to a series of tactical defeats, an extension of counter-insurgency operations, and tens of thousands of coalition and Iraqi lives lost.

Analysis

The formal theory of Martial Race became defunct in military and academic communities when modern theories of biology superseded scientific racism in the 1950s, but the policies, traditions, structures, and modes of thought remained in many respects.[114] The historical cases presented in this monograph highlight many of the possible challenges that contemporary operational planners could face if they do not consider the impacts of racism upon their analysis.

Operational planners faced the pitfalls of martial race thinking when they dehumanized people groups within the environment into the traits of their group identity. This process of viewing people as representations of their group characteristics leads to linear and compartmentalized thinking, discounting the complexity of an operational environment. In the historical cases the process of dehumanizing was heavily influenced by the operational planner's own experience and education within the social hierarchy that had the greatest influence upon them.

As their social hierarchies perpetuated narratives of superiority and inferiority amongst identifiable people groups, operational planners transposed those narratives into their understanding of the environment. In South East Asia, the British fell prey to two fallacies of their institutionalized military knowledge, the "paper standard" and the "first-class power." By judging the Japanese military by their perceived ability to fight on a European battlefield, the British grossly underestimated their future enemies. They created a legitimizing myth that enhanced European standing in the martial race hierarchy and diminished the standing of the Japanese.[115]

Operational planners enabled racism through ignorance when facing multiple social hierarchies of martial race in action within their operational environment. Once the operational

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[114] Rattansi, *Racism: A Very Short Introduction*, 69.

[115] Ferris, ""Worthy of some better enemy?" 231.

planners considered their own experiences and biases, it was essential to understand the other social hierarchies influencing the operational environment, which most planners failed to do. By not considering the influence of social hierarchies on the operational environment, operational planners failed to set achievable and sustainable end states and conditions.

Martial race hierarchies in the environments from the case studies were resilient, created feedback loops, and increased the complexity of the systems. In Korea, US forces could not or would not accept Korean cultural norms such as the concept of *face*, which led to significant challenges when training and integrating the forces. There were multiple social hierarchies acting within the operational environment that created negative feedback loops between US and ROK forces. The result was a hierarchy attenuating force that diminished the martial prowess of the Koreans in the opinion of their US allies.[116]

Different societies viewed the social hierarchies present within the operational environment from different perspectives. The martial race thinking of the adversary did not match that of the operational planners, which created opportunities for deception and introducing multiple dilemmas. North Koreans leveraged this mismatch in perception as they prepared for invasion of South Korea. They prepared extensively for the invasion while appearing to be a "border guard" and completely surprising both South Korean and US military forces.[117]

Operational planners introduced racist beliefs by inadvertently creating increasing feedback loops that increased or diminished the martial prowess of the enemy within their operational models. This process began internally as their societies prepared for war and increased as the enemy acted within the environment, weaker in defeat but stronger in victory. It remained resilient following the conflicts and reinforced a martial race social hierarchy in the form of "revered foe" narratives. This effect was present in the British and American respect for

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[116] Kraus, "American Orientalism in Korea," 157.

[117] DeWeerd, *Strategic Surprise in the Korean War,* 9.

Japanese martial prowess following the Second World War and heading into Korea. This process also negatively influenced the analysis of US military planners and policy makers as they errantly equated the Sunni dominated Ba'ath regime with the Nazi regime of Europe, placing them at the apex of the martial race hierarchy in Iraq. This error led to the focussing of operational planning on addressing Sunni security issues, while ignoring a growing threat of Shi'a militias, enabling the explosion of a sectarian civil war.[118]

A martial race view of one's own forces, allies, and partners distorted the risk calculation of using human and materiel resources in pursuit of tactical, operational, and strategic outcomes. Both the US and British India were reluctant to break from their martial race views of the human resources at their disposal without the impetus of the US Civil War and The First World War respectively. Martial race thinking also led to overconfidence and excessive risk taking as evidenced by the under-estimations of the adversaries in Burma, Korea, and Iraq.

Linear and compartmentalized analysis informed by martial race thinking led to overestimating the risk in conducting a specific operation or tactical action. When operational planners presented this analysis, it had the potential to dissuade their commanders from pursuing a valid course of action. This was the case in the defense of Somaliland during the Second World War, where the British considered Somalis unsuitable for defense. Initial operational planning did not include defensive preparations in the case of Italian hostilities, only to be disproven when Somali soldiers conducted defensive operations with success against Italian forces.[119]

Operational planners did not consider martial race hierarchies, their influence on the social hierarchies present in the operational environment, and the resilience of those hierarchies when determining end states and conditions for operations. Social hierarchies that denigrated or elevated distinct groups within that society were problematic and prolific. Martial race hierarchies

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[118] Godfroy et al., *The U.S. Army in the Iraq War – Volume 1,* 141.

[119] Stoil, "Martial Race and Indigenous Forces," 170.

by their nature denigrate and elevate certain groups, while conferring tangible and intangible benefits to higher martial races and excluding non-martial races.

As demonstrated in India and the US, these hierarchies are incredibly resistant to change despite significant political efforts to reform and a preponderance of evidence to prove the fallacy of those hierarchies.[120] Conversely reforming social hierarchies that are supported by martial race legitimizing myths, while noble in intent, have had disproportionately violent side effects that were unforeseen or unprepared for. As Burma decolonized following the Second World War, the martial races of the Karens, Kachins, and Chins created the nucleolus of a rebellion against the nascent Burmese dominated government.[121]

Contemporary operational planners should heed the lessons of Burma, Korea, and Iraq as they consider the impacts of racist ideas infiltrating their operational analysis and planning processes. The ignorance and prejudice of operational planners in the case studies led to the excess loss of life, the institution of long-term racist policies, and continued instability after large-scale combat operations had ceased. Martial race thinking appeared to provide a useful metaphor for simplifying complex operational environments during the preparation for and conduct of combat operations. However, using martial race thinking in early phases led linear and compartmentalized operational planning and resulted in excessive waste, suffering, and the incalculable loss of military and civilian lives as the affected nations attempted to return to a state of peace and stability.

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[120] Bowers et al., *Black Soldier, White Army,* 15; Omissi, *The Sepoy and the Raj,* 43.

[121] Lunt, "The Burma Rifles," 207.

Recommendations

Military professionals can mitigate the risk of racism influencing operational planning by understanding the historic impacts of martial race thinking and applying contemporary antiracist theories. This observation reinforces the urgency of current efforts to address and eradicate racism within North American military institutions. It also challenges the way that professional military education and military history presents narratives and social hierarchies to contemporary operational planners, a discussion that is growing in intensity in lock step with discussions about racist individuals within military institutions.[122] Understanding martial race theory and its historic impacts, as well as contemporary antiracist theory, can prepare contemporary operational planners to guard against their own biases and leverage adversary biases.

Martial race thinking is the antithesis of Systems Thinking, a critical component of the Army Design Methodology.[123] Martial race theory encourages classifying people groups by inherent martial ability and then introducing those assumptions into planning. Operational planners are at great risk of embodying martial race thinking when they conflate national identities and geographic classifications with racial categories. This creates a situation where the concepts of immutable inherited biological traits are mixed with sociological and cultural trends that are mutable.[124] This is linear and compartmentalized thinking that denies the complexity of the operational environment and distorts an operational planning team's ability to create valid operational approaches.[125]

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[122] Malte Riemann and Norma Rossi, "Decolonising Professional Military Education," *The Wavell Room,* January 9, 2021, accessed January 9, 2021, https://wavellroom.com/2021/01/09/decolonising-professional-military-education/; David Petraeus, "Take the Confederate Names Off Our Army Bases," *The Atlantic*, June 9, 2020, accessed February 10, 2021, https://www.theatlantic.com/ideas/archive/2020/06/take-confederate-names-off-our-army-bases/612832/.

[123] US Department of the Army, Army Techniques Publication (ATP) 5-0, *Army Design Methodology* (Washington, DC: Government Publishing Office, 2015), 1-7.

[124] Rattansi, *Racism: A Very Short Introduction*, 90.

[125] US Army, ATP 5-0, 1-8.

In the summer of 2020, Dr. Ibram X. Kendi released his book *How to be an Antiracist*, which educated readers on the lexicon of racism and antiracism and proposed an approach to being an antiracist individual, which would aggregate to an antiracist society in an attempt to address the racist forces within American society. While aimed at addressing internal sociological pressures, this concept can be applied to the way that contemporary operational planners view the operational environment and construct operational approaches. The concept starts with understanding racism so that one can guard against racist thinking and eventually become antiracist. In this regard, contemporary operational planners must understand how racism and ethnocentrism effects themselves and the operational environment, so that they can guard against this type of thinking and become antiracist in the development of their operational approaches, operational plans, and in the execution of those operations.

Overt support and proliferation of racist policy, activist groups, and ideas are rightfully prohibited in the US Army. However, that does not automatically mean that racist assumptions, influence, and thinking does not occur within operational planning teams. Operational planners must assess and identify martial race thinking and racial biases early in the Army Design Methodological process and then re-visit the possibility of martial race thinking at each step. By rejecting martial race thinking when conducting operational design, contemporary planners will better assess risk, establish more achievable end states and conditions, and better understand the operational environment, the operational problem, and the operational approach.

Conclusions

In considering if war is an art or a science, Clausewitz concludes that it is neither but that "War is an act of human intercourse".[126] It is the interaction of quantifiable human capabilities, such as armies, technologies, and doctrine, as well as the social constructions of the opposing societies, organizations, ideologies, or tribes. Martial race theory posited that martial prowess was hereditary and measurable via biological and cultural indicators. It then ordered those measurements into a social hierarchy to understand and visualize the operational environment and to inform how to allocate forces appropriately within that environment. Martial race theory was clearly flawed as improvements in biological sciences, as well as increasing operational experience, stripped away the evidence that supported it. However, martial race thinking continues to be pervasive, in the same manner that racism and ethnocentrism remain pervasive in civil society in the face of overwhelming scientific evidence and shared experiences to counter those ideas.

Contemporary operational planners may individually abhor racism and racist policy, but they continue to plan and execute in a racist world. They must wrestle with this reality, fighting the racist systems and biases that continue to influence their operational plans and drive them to create racist policies. Planners who understand martial race theory and the thinking that characterizes it are better prepared analyse the operational environment and the social hierarchies that are acting within it, while guarding against racial and ethnocentric biases.

As North American military institutions wrestle with internal racism and inequality, military professionals must also commit to understanding and addressing how racial prejudices, the associated cognitive biases, and logical fallacies impact operational planning and the execution of operations in the future. The most effective way to eradicate martial race thinking

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[126] Carl Von Clausewitz, *On War*, trans. Michael Howard and Peter Paret, Indexed Edition (Princeton, NJ: Princeton University Press, 1989), 149.

from operational planning is to educate planners on martial race theory, to have open discussions

on racism, prejudice, and bias, and to integrate humility and empathy into their approach to

understanding the operational environment.

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