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Light Mindset: An Examination of Canadian Light Forces

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Light Mindset: An Examination of Canadian Light Forces

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ABSTRACT

Light forces remain the Canadian Army's most expedient means of delivering a large conventional force to a theatre of operations. The future security environment will be fraught with conflict and challenges that an agile and well-trained Canadian light force is ideally suited to address. The Light Forces Initiating Directive generated significant momentum within the Canadian Army to examine light forces and their role within the Canadian Armed Forces. This project examines the differences between light forces and other types of infantry and explores several key light forces' characteristics through the use of a case study. The project then reflects on Canada's light forces' history and concludes by examining several considerations that are vital to the employment of Canadian light forces in the future security environment.

CHAPTER 1: INTRODUCTION

On 13 July 2016, then Commander of the Canadian Army (CCA), Lieutenant General J.M.M. Hainse, signed the Light Forces Initiating Directive and established the roadmap to build the Canadian Army's light forces capability.¹ The Light Forces Initiating Directive intent outlines the need to build a “purpose-built, scalable, and agile” light force.² This capability would need to be able to generate and sustain combat power “without dependence on fighting vehicles” and would have the structure and tactical mobility to operate in “selected unique environments (close and complex terrain).”³ The ultimate aim of increasing light forces capability is to “provide the Government of Canada with enhanced flexibility and additional options in the use of Canadian Army (CA) capabilities.”⁴ The increased priority and focus has already seen an improvement in light forces capability and equipment procurement. Several essential capabilities have been reintroduced to the Light Infantry Battalions (LIBs), including Tube-launched, Optically tracked, Wire-guided Anti-Armour weapons (TOW), mortars, and pioneers. The CA's ultimate objective is to “institutionalize a purpose-built combined arms Light Force” that can force generate a Battalion Group in support of Canada's defence objectives.⁵

Despite positive momentum, there are numerous challenges associated with integrating a light force into an army built around medium-weight forces. During the Afghanistan era of cyclic mechanized battlegroup deployments, the Army began taking

¹ Canada, Canadian Army Headquarters, *Light Forces (LF) Initiating Directive* (Ottawa: Canadian Army Headquarters, 2016), 1.

² *Ibid.*, 1.

³ *Ibid.*, 1.

⁴ *Ibid.*, 1.

⁵ *Ibid.*, 7.

steps toward “mechanizing” the LIBs, essentially discarding their light characteristics. In an interview in 2016, LCol Haynes, then Commandant of the Infantry School and Deputy Director of the Royal Canadian Infantry Corps stated, “[LIBs] were never truly considered distinct battalions and given all those specific types of roles. They were simply seen as mechanized battalions without vehicles. And indeed, they were organized that way.”⁶ Most recently, the Canadian Army nearly assigned the newly acquired Tactical Armoured Patrol Vehicles (TAPV) to the LIBs, which would have gone counter to the LIBs’ “light” employment and capability. The TAPVs are a heavy platform and, in addition to a significant increased logistical and training demand, may have stagnated essential light forces organization and training. Speaking about the mechanization of the LIBs, Haynes comments:

Naturally, this resulted in the retardation or even reluctance to think about and develop true light infantry organizations, equipment, and doctrine. It is difficult to focus on developing these things if one knows the light units are nothing more than mechanized battalions minus APCs.⁷

Within the Canadian Mechanized Brigade Groups, it can be challenging to develop adequate training opportunities for properly integrating light and medium-weight forces due to limited time, resources, and the availability of joint enablers.

Conversely, unlike the training environment, the world is littered with conflicts ideally suited for light forces employment. The future security environment is anticipated to be unpredictable and precarious. *Strong, Secure, Engaged: Canada’s Defence Policy*, describes conflict as increasingly complex. Economic inequality, climate change, and

⁶ Steven Fouchard, “Light Forces Initiative Aims for Higher Responsiveness,” *Esprit de Corps* (31 Oct 2016): 1.

⁷ Alex D. Haynes, “The Force Employment Concept and the Infantry: A Proposal,” *Canadian Army Journal* 9, no. 2 (Summer 2006): 41.

linkages between inter and intra-state conflict are rapidly changing the nature of the security environment.⁸ Globalization and mass urbanization have all but guaranteed that conflicts will often be fought within or near urban environments. As well, with the significant technological advantages western militaries currently hold, adversaries will often utilize complex terrain (jungles/forests, mountains, cities) to neutralize this overmatch. The unpredictable nature of modern conflict necessitates that western militaries need to be able to operate rapidly in complex terrain that may be unsuited for vehicles. Whether fighting Violent Extremist Organizations (VEO) or Maligned State Actors (MSA), rapid response in complex terrain will be a critical capability that will be required for operations across the spectrum of conflict.

As a middle power practicing contribution warfare, Canada must ensure that any military capability is scalable, multi-purpose, and cost-effective. Light forces can provide a relatively inexpensive, adaptable, and rapid military option compared to the onerous and costly deployment of armoured vehicles. Speaking about the responsiveness of light forces, LCol Haynes comments that, “the ability to deploy within a set number of days, or hours, or weeks, and the ability to quickly get from Canada to wherever we’re going...the key characteristic is that they [light forces] would do it faster than the rest of the Army could.”⁹ In a time when the population and Government of Canada demand an instant and demonstratable response to a conflict, light forces could represent a rapid and cost-effective conventional option for the Canadian Army.

⁸ Canada, Department of National Defence, *Strong, Secure, Engaged: Canada’s Defence Policy* (Ottawa: DND Canada, 2018), 52.

⁹ Steven Fouchard, “Light Forces Initiative Aims for Higher Responsiveness...”, 1.

The renewed Canadian Army interest and focus on light forces, combined with the nature of the future security environment, presents an ideal opportunity to examine how light forces operate and consider optimal employment factors within the Canadian context. Through an examination of what light forces is, the identification of key characteristics, a study of Canadian Light forces evolution and considerations, this project will argue that a shift in light forces mindset and increased light forces understanding is required for military commanders and planners to optimize the employment of light forces in the future security environment.

CHAPTER 2: LIGHT FORCES

Before delving into the specifics of light forces characteristics and employment, it is vital to have a common understanding of what defines “light forces” and how they differ from other conventional or unconventional infantry forces. Within the Canadian context, “light forces” are the combined arms grouping of light infantry with other arms and enablers. In the American context, the sheer size and scope of their Light Infantry Divisions inherently hold those combined arms and enabling assets, making the distinctions between “light forces” and “light infantry” irrelevant. This chapter will examine the concept of light forces and how it differs from other unconventional (Special Operations Forces) and conventional (Armoured and Regular) infantry forces and comment on the competing views of light forces related to their organization and employment mindset.

UNCONVENTIONAL INFANTRY – SPECIAL OPERATIONS FORCES

Although they share a common infantry ancestry with light forces, Special Operations Forces (SOF) are separate and distinct in terms of their selection, design, roles, and missions.¹⁰ SOF operators are often drawn from the pre-existing military population through highly refined and specialized selection processes. These units ensure only candidates exhibiting the required physical and mental characteristics are accepted and trained. Although light forces want soldiers to exhibit certain characteristics, no selection process is employed. Similarly, the design and organization of SOF sees them operating outside the conventional military chain of command. Unlike conventional forces, SOF typically operate under a Special Operations Task Force (SOTF) grouped

¹⁰ Edward E. Thurman, “The Light Infantry Division: An Operational Force,” United States Army Command and General Staff College Fort Leavenworth, 1985: 1.

with allied SOF vice conventional forces.¹¹ Light forces remain grouped under the conventional Land Component Commander (LCC), and in the Canadian context, the LIBs are part of Canadian Mechanized Brigade Groups. Lastly, although there is some overlap and similarities in the types of roles and missions between SOF and light forces, SOF are often employed and controlled at the strategic level. In the current context of the “Grey Zone” and operations below the threshold of conflict, SOF units play an increasingly important strategic role. Conversely, as a conventional force, light forces can occasionally achieve strategic effects, but are focused on the tactical level. Despite a common ancestry and familiar roles, the highly specialized nature of SOF operations and employment distinguish them from light forces.

CONVENTIONAL INFANTRY – ARMoured, REGULAR, AND LIGHT

Critical to the understanding of light forces is the distinction between “light” and other types of conventional infantry forces. The North Atlantic Treaty Organization (NATO) recognizes two forms of infantry: “Heavy,” or armoured infantry, that have the high mobility, and protection of armoured personnel carriers (APCs) or mechanized infantry fighting vehicles (IFVs) to be able to fight alongside tanks; and “Light” infantry that move via ground or air/aviation to fight dismounted, in terrain where tanks cannot deploy.¹² Colonel Huba Wass de Czege, in his article *Three Kinds of Infantry*, argues that armies must resist limiting the definition of infantry to merely two types, and instead argues that due to the wide functional range of infantry missions, there are three essential types of infantry – Armoured, Regular, and Light Infantry.¹³

¹¹ Bernd Horn, *We Will Find a Way: Understanding the Legacy of Canadian Special Operations Forces*, (MacDill AFB: Joint Special Operations University, 2012), 9.

¹² John A. English, “Thinking About Light Infantry,” *Infantry* 74, no. 6 (Nov-Dec 1984): 22.

¹³ Huba Wass de Czege, “Three Kinds of Infantry,” *Infantry* 75, no. 4 (Jul-Aug 1985): 11.

Armoured infantry is focused on the advance and protection of the Main Battle Tank (MBT) and can fight mounted or dismounted.¹⁴ Their inception can be traced back to military theorist Liddell Hart, who envisioned carrier-borne troops, who served as assault troops or “tank marines” as part of a larger armoured organization.¹⁵ Their critical tasks are to keep pace with the advancing armour and facilitate their movement through close terrain. Their tasks also include conducting overwatch during moves or temporary halts and support the clearing of mines and other obstacles. When located in static positions, armoured infantry provide close security and protection. Throughout all tasks, it is critical that they identify and suppress infantry equipped with anti-tank weapons.¹⁶ Czege comments on the vehicle and equipment requirements of armoured infantry:

It needs a carrier that has mobility equal to that of the tank. It needs a long-range standoff armour-killing missile system to provide overwatch to moving tanks. It needs a cannon system that can kill non-tank threats to tanks such as other carriers, attack helicopters, and dismounted infantry. It needs to carry mines and other obstacle-creating devices, including pioneer tools.¹⁷

As armoured infantry will operate in the open and lethal environment of tank warfare, armoured infantry must be equipped with vehicles that have the requisite protection to ensure their survivability against machineguns and automatic cannons.¹⁸ Within the Canadian context, although the Light Armoured Vehicle (LAV) based mechanized infantry battalions serve many of the previously identified roles of armoured infantry, their lack of protection and anti-tank firepower prevent their classification as pure armoured infantry. Canada effectively does not field armoured infantry.

¹⁴ *Ibid.*, 11.

¹⁵ Peter Kasurak, *Canada's Mechanized Infantry: The Evolution of a Combat Arm, 1920–2012*, (Vancouver: UBC Press, 2020), 13.

¹⁶ Huba Wass de Czege, “*Three Kinds of Infantry...*”, 11.

¹⁷ *Ibid.*, 11.

¹⁸ *Ibid.*, 11.

The second type of infantry identified by Czege is regular infantry, who utilize vehicles for mobility, but fight primarily dismounted.¹⁹ Much like armoured infantry, regular infantry has a close relationship with armoured elements. At the tactical level, regular infantry is often supported by and supporting tanks. Their critical tasks in the offence, include following and supporting lead armoured elements, reducing bypassed pockets of enemy, maintaining lines of communication, and passing through armour elements to clear well-organized and fortified enemy positions.²⁰ Regular infantry also provides the necessary close protection to engineering elements to dismantle fortified positions and well-organized anti-tank defences. In the defence, regular infantry's defining characteristic is their ability to hold key terrain. Similarly, in the urban defence, regular infantry is critical to fortification and defence of towns and villages.²¹ Regular infantry can accomplish this by having the mobility to move to key terrain quickly and having the requisite capacity internally to carry the necessary defensive stores and firepower to mount a credible defence.

Comparing armoured and regular infantry, Czege comments that, "Regular infantry is best at holding ground, compared to armoured infantry which is best at supporting the tank in the dynamic element of the defense."²² In order to meet the demands of this broad role, regular infantry must be equipped with a vehicle that can move quickly and safely across the battlefield and be capable of carrying at least a full section (8 soldiers) and all their equipment (including heavy weapons, breaching equipment, and defensive stores).

¹⁹ *Ibid.*, 12.

²⁰ *Ibid.*, 12.

²¹ *Ibid.*, 12.

²² *Ibid.*, 12.

In the Canadian context, the mechanized infantry battalions meet the definition of regular infantry, with the LAV providing the necessary balance of mobility, protection, and capacity to keep pace with armour, eliminate enemy positions, and rapidly occupy a defence. The modern Canadian mechanized concept was first codified in *The Conduct of Land Operations, CFP 165*, which set the doctrinal overview of the Canadian Army. The manual highlighted the key attributes of mechanized infantry, noting that because they could keep pace and be supported by the other combined arms (tanks and self-propelled artillery), this grouping formed “the closest and most effective integration of three arms into a single fighting team.”²³ Given the resource limitations of the Canadian Armed Forces (CAF) and the Canadian Army, the mechanized infantry battalions are also often called upon to complete tasks generally associated with armoured infantry.

The final type of infantry identified by Czege is light infantry, who specialize in complex terrain, patrolling, infiltration, raids, ambushes, and rapid air/aviation movement.²⁴ Light infantry produce a significantly reduced tactical signature and derive their protection from their ability to remain undetected and operate in complex terrain, rather than from proximity to protective armoured assets. Light infantry can provide an adaptable, self-sufficient, and rapid initial response capability as an entry point for follow-on forces. They are ideally suited to complement the actions of medium and heavy-weight forces.²⁵ In the offence, light infantry can utilize complex terrain to infiltrate and seize critical points or disrupt enemy lines of communication. Dependant on air and aviation assets, light infantry can be utilized to conduct airborne, airmobile, or air

²³ Peter Kasurak, *Canada's Mechanized Infantry: The Evolution of a Combat Arm, 1920–2012...*, 82.

²⁴ Huba Wass de Czege, “*Three Kinds of Infantry...*”, 13.

²⁵ *Ibid.*, 13.

assault operations to seize key terrain such as bridges or crossing sites for linkup. Similarly, they can conduct deep operations to disrupt enemy forces and facilitate the attack of mechanized brigade or division forces.²⁶ In the defence, light forces can deny the enemy avenues of advance through complex terrain or utilize these areas to maintain offensive action while defending through raids, ambushes, and spoiling attacks. Unlike regular infantry, light infantry is not suited to conduct a static defence, as they lack the vehicles and capacity to move the necessary stockpiles of equipment.²⁷ Light infantry are better suited to dispersed hit-and-run tactics to deny the enemy access to roads or supply routes. Czege comments that, “Light infantry must be light, but capable of tremendous firepower in short but violent engagements.”²⁸ Light infantry equipment must find a balance between weight and lethality, and all vehicles should be transportable by helicopter. Light infantry must be able to communicate and leverage combined arms and joint fires to mitigate their lack of integral firepower. In the Canadian context, the LIBs are generally equipped to be employed as light infantry. Similar to Canadian mechanized forces, due to the limitations of Canadian military resources, Canadian light infantry are also often employed in regular infantry roles.

Through the application of Colonel Czege’s *Three Kinds of Infantry* model, the distinction between light forces and other types of conventional infantry becomes more pronounced and highlights the gap in NATO’s binary infantry definition. It is important to note that although the roles are clearly defined, the realities of military funding and resource management necessitates actual infantry units being assigned tasks from across

²⁶ *Ibid.*, 13.

²⁷ *Ibid.*, 13.

²⁸ *Ibid.*, 13.

the spectrum of conventional infantry. Commenting on the broad assignment of tasks,

Czege states that:

Both armoured and light infantry can do regular infantry tasks, but not as well as regular infantry can do them. Regular infantry can occasionally support the advance of tanks and work in close tactical cooperation with them. Regular infantry can also occasionally perform dismounted combat in highly restricted terrain. But the equipment, organization, and training of the three types of infantry make each particularly well-suited for a particular range of missions.²⁹

Acknowledging the risks associated with out of role employment, military commanders and planners need to understand that the nature of each type of infantry is not just defined by their structure and equipment. Rather it is their mindset and manner in viewing a tactical problem.

LIGHT INFANTRY – ORGANIZATION OR MINDSET?

After the reintroduction of the Light Infantry Divisions into the United States Army in 1983, military commanders and planners struggled to define the role of light forces in the Cold War environment.³⁰ Military journals and the School of Advanced Military Studies at Fort Leavenworth dedicated significant time and thought to determine the role of the Light Infantry Divisions and how light forces could be employed on the battlefield against the Soviets. During this period, Major Scott R. McMichael wrote *A Historical Perspective on Light Infantry*, which provides an excellent overview of light forces and their employment over the second half of the 20th century. In his writings, McMichael details the diverging views on what constitutes light infantry – namely the debate between organization and mindset.³¹

²⁹ *Ibid.*, 13.

³⁰ Scott R. McMichael, “A Historical Perspective on Light Infantry,” *Combat Studies Institute*, no. 6 (1987): xi.

³¹ *Ibid.*, xi.

Followers of the “organizational” view of light infantry see the definition of “light” as tied to its organization. Light infantry is light because they do not possess the integral heavy equipment, weapons, and vehicles of their mechanized counterparts.³² Their role is to fight dismounted, in close or complex terrain, and employ tactics that do not vary considerably from dismounted regular or armoured infantry. The value of this type of light infantry is their strategic mobility.³³ They can be moved rapidly to conflict areas across the globe via strategic airlift and represent a relatively cost-effective and efficient means to get “boots on the ground”. Proponents of the organizational view regard light infantry as a general-purpose force. McMichael notes that during this period, this view was exemplified in the United States in *Field Circular 71-101, Light Infantry Division Operations*, which saw large portions of text copied verbatim from *FM 71-100, Armored and Mechanized Division Operations*.³⁴ Although not fully aligned with the light force’s definition, this view reflects the reality of political desires and military resource constraints.

In contrast, McMichael presents a second “mindset” interpretation that sees the distinction of light infantry as based upon attitudes and tactical style.³⁵ Proponents of this view argue that light forces are light, not due to their equipment (or lack thereof), but due to their state of mind. Evolving out of European and colonial skirmishing units, these forces historically employed hit-and-run raids, ambushes, infiltration, and served as guards for the main forces. Describing the uniqueness of this interpretation of light forces, McMichael comments that:

³² *Ibid.*, xi.

³³ *Ibid.*, xi.

³⁴ *Ibid.*, xi.

³⁵ *Ibid.*, xi.

Although they share many of the same skills as regular infantry, they are especially distinguished by their attitude of self-reliance, their mastery of the environment, their versatility, and their high esprit. These characteristics produce a special tactical approach to the battlefield. Offensively oriented, flexible, adaptable, and innovative, light infantry capitalizes on stealth, surprise, speed, and shock. Not psychologically tied to a supply line or to the availability of combat support, light infantry operates at night, hitting the enemy hard, when and where he does not expect it. Light infantry relies on its own resources and its own organic weapons to destroy the enemy at close range. Light infantry believes that the light infantryman is the decisive weapon.³⁶

This mindset interpretation of light infantry, represents an essential aspect of light forces capability development that must be captured in the Canadian light forces revitalizing campaign.

The examination of “what are light forces,” and how they differ from other conventional or unconventional infantry forces demonstrates the complexity associated with light force evolution and employment. Czege’s *Three Types of Infantry* model demonstrates the distinct organization, role, and employment of the different forms of infantry, and the challenges with employing them outside of their primary role. This presents a challenging dynamic for the Canadian Army, which does not have the manning or resources to pursue three distinct types of infantry with associated vehicle and equipment procurement requirements. This constraint has generated significant debate centred around adopting a homogeneous approach to Canadian infantry. As an example, Haynes, in his article *The Force Employment Concept and the Infantry: A Proposal* argues for the divestment of the mechanized fleet in favour of a light focus.³⁷ This is contrasted by Peter Kasurak, in his book *Canada's Mechanized Infantry: The Evolution of a Combat Arm, 1920–2012*, who counters Haynes’ proposal and advocates

³⁶ *Ibid.*, 234.

³⁷ Alex D. Haynes, “The Force Employment Concept and the Infantry: A Proposal...”, 41.

for the value of the mechanized forces.³⁸ It is important to note that there are essential roles and tasks on the battlefield for all three types of infantry. The uniquely Canadian challenge will be developing a sufficiently adaptable infantry force.

As well, it is vital to recognize the competing views regarding what constitutes light forces from an organization and employment viewpoint, as this can fundamentally alter the nature of any light forces restructuring. The Light Forces Initiating Directive makes it clear that the Canadian Army seeks to adopt the mindset and employment perspective, but the challenge will be integrating this light force into the existing medium-weight army and ensure a sufficiently broad understanding of light force employment. In order to fully comprehend light forces evolution and employment, it is vital to examine the key light forces characteristics.

³⁸ Peter Kasurak, *Canada's Mechanized Infantry: The Evolution of a Combat Arm, 1920–2012...*, 190.

CHAPTER 4: LIGHT FORCES KEY CHARACTERISTICS

After exploring the different types of infantry, it is critical to examine the key characteristics of light forces. Although there is no universally accepted set of characteristics, military historians, strategists, and historical case studies present us with several commonalities related to the successful formation and employment of light forces. Although other types of infantry may exhibit some of these characteristics, the light force embodies them to a greater degree. This chapter will examine several light forces characteristics, namely the ability to thrive in complex terrain, offensive focus, non-standard training and organization, and the use of surprise, shock action, and speed. This chapter will then relate each of these characteristics to the light forces case study of the Chindits operations during the Second World War.

During the Burma campaign against the Japanese in 1943 and 1944, a group of light infantry were developed to specialize in jungle warfare and conduct guerrilla-style interdiction of Japanese lines of communication. The largest group of these forces were dubbed ‘the Chindits’, named after the *Chinthè*, a Burmese mythical beast that guards Buddhist temples. The Chindits employed long-range penetration groups and conducted deep infiltrations, raids and ambushes. After conducting their kinetic actions, they would fade back into the jungle for safety. This was a significant change in mindset, as the Allied forces viewed the Burmese jungles equally as vicious and deadly as their Japanese opponent.³⁹

³⁹ C.G.H. Dunlop, “Chindits,” *Oxford Dictionary of National Biography*, last accessed 2 April 2020, <https://www.oxforddnb.com/view/10.1093/ref:odnb/9780198614128.001.0001/odnb-9780198614128-e-95557;jsessionid=4E790BDCAD231361F9B21358CABA32C5>

The use of the Chindits as a light force's case study is tied to the then-revolutionary concept that a large, specially trained, nonindigenous force could operate indefinitely in the enemy's rear. This concept was developed by their commander Major General Orde Wingate, and despite the campaigns many problems, the force ultimately succeeded in tying up substantial numbers of Japanese forces and causing significant Japanese casualties. Further, in *A Historical Perspective on Light Infantry*, McMichael argues that the Chindits serve as a precursor for modern airmobile forces.⁴⁰ As well, the Chindits demonstrated many key capabilities, including the ability for a light force to conduct sustainment, mobility, and offensive action in complex terrain. The Chindits example also provides many positive and negative examples of light forces employment and, for this reason, provides a valuable case study in which to examine the key light forces characteristics.

THRIVE IN COMPLEX TERRAIN

Lacking the speed and armoured protection of vehicles, light forces are inherently vulnerable. For light forces, the most valuable mitigation for this vulnerability is the use of complex terrain. Mountainous regions, arctic tundra, marshlands and swamps, dense forest and jungle, and even urban environments all present ideal forms of complex terrain that light forces can utilize to enhance their survivability and effectiveness. Complex terrain provides concealment, restricts or negates vehicle movement, and ultimately enhances the light forces' freedom of manoeuvre.

A light force cannot merely survive in complex terrain; it needs to be able to thrive. A light forces soldier needs to be comfortable being uncomfortable in complex

⁴⁰ Scott R. McMichael, "A Historical Perspective on Light Infantry...", 18.

terrain. Whether combatting an opponent who is mechanized, light, or an insurgent force, the light forces soldier must adopt the mindset that the complex terrain is their refuge, not the enemies. Light forces must ensure their training is designed to push beyond the point of mere survival. Prioritization during training of fitness and fieldcraft skills are essential. Light forces soldiers need to adopt the hunter mindset and ensure a high degree of self-reliance.

In the Chindits example, the Burmese jungle was a harsh environment composed of a mix of rough hills and valleys that were interspersed by numerous rivers and dense tropical jungle. The jungle was incredibly thick and instead of following a path, a tunnel would need to be cut through the vegetation to be able to traverse. As well, during the monsoon season, the area became nearly impassable as the low ground became flooded, and due to the mud, any elevation was near impossible to scale.⁴¹ Adding to the difficult ground was the weather and climate, which saw high humidity and temperatures, coupled with constant rain. Further, the jungles were infested with mosquitos and other vectors that carried many diseases, including malaria and typhus. Prior to the development of the Chindits, this terrain only afforded sanctuary to the Japanese and was something that the Allied forces had to endure or actively fight against.⁴²

One of the most critical aspects of the Chindits was their reversed system of value regarding complex terrain. As previously discussed, Allied forces viewed the jungle as their enemy and envied and feared the Japanese ability to operate within it. Operating behind enemy lines, the Chindits were able to reverse this mindset, as the paths and trails

⁴¹ Jon Diamond, *Orde Wingate: Leadership, Strategy, Conflict*, (Oxford: Bloomsbury Publishing, 2012), 114.

⁴² Scott R. McMichael, "A Historical Perspective on Light Infantry...", 43.

were the enemy's, but the dense jungle became their refuge.⁴³ It was near impossible for the Japanese to reach a Chindit's camp without first compromising their approach on a myriad of noise-making branches and leaves. As well, due to their mastery of the terrain, the Chindits were able to utilize avenues of approach that the Japanese had deemed impassable. The Chindits were able to display unmatched tactical and operational maneuver in complex terrain. Operating in this complex terrain, the Chindits were required to move beyond purely enduring or surviving; they were able to thrive.

The importance of the Chindits extends beyond any tactical or operational victories and resonates more in their effect on the morale of both combatants. Up until this point in the war, both sides acknowledged the Japanese superiority in jungle warfare.⁴⁴ The Chindits proved to the Allied forces that the Japanese were equally vulnerable and could be defeated in the jungle environment. The morale boost was a welcome one for the Allied forces. Following Wingate's death, Prime Minister Churchill would comment on Wingate's impact:

There was a man of genius who might well have become also a man of destiny. He has gone, but his spirit lives on in the long-range penetration groups and has underlain all these intricate and daring air operations and military operations based on air transport and on air supply.⁴⁵

Similarly, it taught a parallel lesson to the Japanese forces, as the jungle was no longer their sole refuge. Following the war, the Japanese Fifteenth Army commander, General Mutaguchi Renya, wrote that the Chindit operations were an important factor in the

⁴³ *Ibid.*, 19.

⁴⁴ *Ibid.*, 43.

⁴⁵ Jon Diamond, *Orde Wingate: Leadership, Strategy, Conflict...*, 8.

inability of his forces to invade India.⁴⁶ The Chindits example demonstrates the essential light forces' characteristic of being able to thrive in complex terrain.

OFFENSIVE FOCUS

Although displaying a high degree of flexibility and adaptability in the proper terrain, light forces are inherently offensive focused. Unlike their armoured or regular infantry counterparts, light infantry often lacks the ability to carry heavy weapons or significant engineering or defensive stores to mount a credible static defence. As well, fixing light forces to a static defence often concentrates their forces and increases their vulnerability to enemy fire. Alternatively, even during defensive operations, commanders should seek to utilize light forces in offensive roles.

A light forces greatest strength is aggressive patrolling in complex terrain leading to domination of that ground. Commanders should seek to utilize a light forces' superior tactical mobility, stealth, and offensive attitude. Even during defensive operations, a light force can attack enemy lines of communication, deny avenues of approach through complex terrain, and conduct disruption operations throughout the enemy's depth. To overcome the lack of integral firepower, light forces need to ensure familiarity employing artillery and airpower.

The light force's characteristic of offensive focus was exemplified in the Chindits' example during the conduct of their defensive operations. Over the course of six days, from 5-10 March 1944, the Chindits inserted 9,000 men and 1,100 animals secretly into the enemy rear. These forces established a series of blocking positions that

⁴⁶ Spencer C. Tucker, *World War II: The Definitive Encyclopedia and Document Collection*, last accessed 2 April 2020, <http://ebookcentral.proquest.com/lib/cfvlibrary-ebooks/detail.action?docID=4647663>., 408.

were well-fortified and received additional support weapons by air transport. Critical to the defence was the employment of mobile “floater” columns or “jitter” patrols that patrolled to the front and flanks of the defensive positions.⁴⁷ These “floater” columns were well-positioned to attack any enemy from the rear or flank, if they attempted to clear the Chindits’ blocking position. The “floater” column maintained radio contact with their assigned blocking position. The Japanese proved vulnerable to these types of patrols, and in some cases spoiling attacks by these columns resulted in the Japanese calling off their own attacks.⁴⁸ The use of “floater” columns and “jitter” patrols allowed the Chindits to retain the initiative even in the defence. Only when the columns lacked adequate firepower, or the Japanese massed sufficiently superior forces would these types of screening patrols prove ineffective.⁴⁹ The Chindits’ use of screening patrols provides an excellent example of the offensively oriented nature of light forces.

Conversely, the Chindits also provide an example of the misemployment of light forces related to defensive operations. Light forces, in this instance the Chindits, operating behind enemy lines, are ill-suited to conduct or to withstand extended defensive operations. The Chindits had a long, and air dependant, line of communication and lacked the combined arms firepower necessary to conduct this type of operation. As well, coupled with the long lines of communication, there was an inability to replace Chindit casualties. In several instances, the Chindits force, more specifically their sister formation Galahad, were employed in extended defensive operations or attacks against fortified Japanese positions. This type of misemployment generated significant Chindit

⁴⁷ Chindits Veterans Association, “Chindits – Special Force Burma 1942-1944,” last accessed 2 April 2020, <http://www.chindits.info/>

⁴⁸ Scott R. McMichael, “A Historical Perspective on Light Infantry...”, 21.

⁴⁹ *Ibid.*, 21.

casualties, which could not be easily replaced. Operations designed to take and hold ground for an extended duration failed to capitalize on the Chindits' strengths, namely their maneuverability through complex terrain and their surprise and shock action.⁵⁰ Critical to the success of the Chindits and any light force, is their ability to remain offensively focused and avoid misemployment in unsuited roles and operations.

NON-STANDARD TRAINING AND ORGANIZATION

Unlike SOF operators, light force soldiers are not specifically selected for their role. As a result, training must ensure that soldiers are able to become experts in light forces operations. Training must focus on marksmanship, operation of all manner of weapons systems, fieldcraft, and navigation. Despite this mastering of infantry fundamentals, the training and organization of a light force should be specifically tailored to the situation and context in which they are operating. All facets of operations, such as communication, movement, and sustainment, will need to overcome the specific challenges posed by complex terrain, deep or dispersed operations.

In order to enhance their survivability and concealment, light forces need to thrive in the context of decentralization and dispersion. Light forces should typically move in small elements to avoid or disperse detection. In this manner, light forces can either infiltrate undetected or mask their true size and intentions to the enemy. Once successful infiltration has been achieved, light forces need to mass for combat action. As light forces have limited weapons systems and ammunition, rapid and decisive firepower is required during the assault. Similar to the infiltration, light forces need to quickly disperse and exfiltrate following the attack or risk being exposed to indirect fire and

⁵⁰ *Ibid.*, 37.

enemy reinforcements. Decentralized and dispersed operations require significant trust and skill in junior leaders, as they need to be able to operate independently but synchronized with the higher-level plan. Junior leaders need to be empowered to demonstrate initiative and rapid decision making.

In the case of the Chindits, their soldiers were not specially selected elites; they were ordinary soldiers from regular battalions, mostly drawn from the British Indian Army. Wingate did not believe a special type of soldier was required for long-range penetration or light forces operations. He believed that a soldier skilled in jungle warfare could be developed through good leadership and training. Speaking about the selection and training of his soldiers, Wingate stated:

What was it that made these ordinary troops, born and bred for the most part to factories and workshops, capable of feats that would not have disgraced Commandos? The answer is that given imagination and individuality in sufficient quantities, the necessary minimum of training will always produce junior leaders and men capable of beating the unimaginative and stereotyped soldiers of the Axis.⁵¹

Wingate's approach highlights an important distinction between light forces and SOF. A light force must ensure its training does not become too overly specialized, intensive, or costly as they risk creating several force generation challenges.

Wingate aligned Chindits training along two primary themes: physical training and jungle fieldcraft. As previously described, the Burmese jungle was an unforgiving environment, and as a result necessitated soldiers who had the physical and mental endurance to withstand its pressures. The pace, duration, and intensity of the training was designed to generate and maintain an extremely high level of stress and physical demands. Wingate's intent was to ensure that Chindits soldiers had the strength to suffer

⁵¹ *Ibid.*, 13.

and endure this terrain and the challenging nature of their operations. As well, the training also served as a means to remove those soldiers who could not endure these pressures.⁵² The Chindits conducted gruelling weighted marches through the jungle terrain and were placed on restricted rations and water. Upon completion of their training, the Chindits were given time to recuperate before conducting actual operations. Once recovered, the Chindits were able to enter the Burmese jungle, confident that they had the physical and mental endurance to thrive in this environment.⁵³

The second key theme of Wingate's training regime was that of jungle fieldcraft. This training focused on giving every soldier expert-level training on the skills they would need to operate behind enemy lines. Skills included map reading, jungle navigation, scouting, patrolling, marksmanship, river crossings, watermanship, column marching, infiltration, night operations, terrain appreciation, squad, platoon, and company tactics, covering of tracks, evasion, and defensive operations.⁵⁴ Every soldier needed to be competent in navigation and familiar with every weapon system in the unit. Similarly, all platoon leaders and non-commissioned officers needed to be competent in the use of radios and calling for fire support. Due to the isolated nature of their operations, the Chindits designed their training to ensure that if a machine gunner, mortarman, radio operator, or forward observer became a casualty, another soldier could quickly take his place. The Chindits also invested significant effort in ensuring standard operating procedures (SOPs) for all types of operations. Actions like river crossings, establishing temporary harbours, and actions on enemy contact were rehearsed

⁵² Pacific War Online Encyclopedia, "Chindits," last accessed 2 April 2020, <http://pwencycl.kgbudge.com/C/h/Chindits.htm>

⁵³ *Ibid.*, 1.

⁵⁴ Scott R. McMichael, "A Historical Perspective on Light Infantry...", 16.

extensively to ensure they could be conducted quickly and with minimal direction.⁵⁵ The last critical piece of jungle fieldcraft training was removing the survivalist mentality and instead instilling a hunter mindset. One Chindits commander commented that, “he instilled in his men the idea that the Chindits were the kings of the jungle, who would boldly seek out the Japanese in their lairs. Let the Japanese come, if they were brave enough to meet their doom.”⁵⁶ The extensive and unorthodox training by the Chindits is noteworthy as they proved themselves superior in jungle fieldcraft to the Japanese.⁵⁷

The Chindits example demonstrates the impact that light forces soldiers, thoroughly trained in physical and mental endurance and experts in fundamental skills, can have on a conflict. Essential skills such as marksmanship, land navigation, and fieldcraft ensure light forces soldiers are able to operate independently and can replace each other in the event of casualties. Speaking about the value of intense training, Chindits’ Brigadier Michael “Mad Mike” Calvert stated, “most soldiers never realized that they could do the things they did...One advantage of exceptionally heavy training is that it proves to man what he can do and suffer.”⁵⁸ The Chindits example also exemplifies that a good infantry soldier can be converted into a good light forces soldier if given the requisite training.

SURPRISE, SHOCK ACTION, AND SPEED

In *A Historical Perspective on Light Infantry*, Scott R. McMichael argues that the summation of light forces operations can be characterized by three main features, namely

⁵⁵ *Ibid.*, 16.

⁵⁶ *Ibid.*, 33.

⁵⁷ John A. English, and Bruce I. Gudmundsson, *On Infantry...*, 142.

⁵⁸ Pacific War Online Encyclopedia, “Chindits...”, 1.

surprise, shock action, and speed.⁵⁹ A light force can achieve surprise in time and space through a variety of means. As previously discussed, a light forces soldier can utilize superior fieldcraft, the cover of darkness, and the domination of complex terrain to infiltrate an enemy position and set up for an attack. Extensive use of reconnaissance allows for light forces commanders to determine enemy weaknesses and gaps for exploitation. A light force can also achieve surprise by attacking from multiple or unexpected directions. Ultimately, a light force achieves surprise through the enemy's inability to predict their actions.

Having achieved surprise, a light force inflicts shock action on the enemy through the application of firepower and maneuver. Despite limitations on their weaponry and ammunition, a light force can deliver accurate and heavy volumes of fire for short periods of time. Combining this heavy fire with rapid maneuver to the flanks and rear of the enemy, generates a powerful shock action effect. The maintenance of this momentum is critical to the success of a light force, as any delay will result in the enemy employing indirect fires or reserve forces. Similarly, any delay during the attack will stretch the light force's already limited ammunition stores. Therefore, a light force should seek close, rapid, and violent engagements to generate the necessary shock action effect on the enemy.⁶⁰

Lastly, a light force must utilize speed in its operations. As previously discussed, a light force relies on their knowledge of the complex terrain, a high degree of fitness and fieldcraft to rapidly traverse ground and attack the enemy faster than he thinks possible. Light force commanders must continuously balance the requirements of stealth and

⁵⁹ Scott R. McMichael, "A Historical Perspective on Light Infantry...", 224.

⁶⁰ *Ibid.*, 225.

speed, and as a result, a light force will rarely use trails and roads. Although a careful balance of speed and stealth is essential, speed must be embraced not only in the physical domain, but also as a factor in the cognitive, through rapid decision making. Light force commanders must be able to react immediately to changes in the tactical plan or enemy situation as they often lack the reinforcements, sustainment, or mobility of mechanized forces. As a result, speed in both the physical and cognitive domain are essential to a light force's success or failure.⁶¹

In the Chindits example, they achieved surprise, shock action, and speed through a variety of means. The Chindits exploited their superior tactical mobility and expert level jungle fieldcraft to conduct their long-range penetration operations. To achieve surprise, the Chindits would infiltrate away from trails or paths to approach the objective. They would then conduct a quick and well-practiced reconnaissance to determine the enemy's strength and disposition. The Chindits would then approach as closely as possible to the enemy's flank or rear. Having achieved surprise, the Chindits would then attack with a high volume of fire from multiple directions supported by machine guns and mortars. The Chindits were able to achieve such a decisive shock action effect that often the attack would drive off the Japanese defenders, and in some instances, even if the Chindits were outnumbered. Once the objective had been destroyed, the Chindits would utilize their speed and tactical mobility to fade back into the jungle, often drawing the Japanese into futile pursuits aimed at retaliation.⁶²

Ultimately, the Chindits force proved the psychological impact that light forces can have on enemy and friendly forces. The Japanese were not prepared to face an Allied

⁶¹ *Ibid.*, 225.

⁶² *Ibid.*, 27.

force that could move, attack, and defeat them in a jungle environment. Prior to the operation, Wingate commented, “If we succeed, we shall have demonstrated a new style of warfare to the world, bested the Jap at his own game, and brought nearer the day when the Japanese will be thrown bag and baggage out of Burma.”⁶³ The actions of the Chindits and Galahad eroded confidence among Japanese troops. Conversely, the impacts of this light force greatly improved the morale of Allied forces. Their success demonstrated that the Japanese could be defeated and that any good soldier could utilize the jungle to their advantage. The confidence spread throughout the Fourteenth Army and encouraged an optimistic spirit. Speaking about the eventual dissolving of the Chindits, Lord Mountbatten wrote:

It was the most distasteful job in my career to agree to your disbandment, but I only agreed because by that time the whole Army was Chindit-minded, and therefore there was no need for a Special Force as such.⁶⁴

The Chindits exemplified the key characteristics of light forces through their ability to thrive in complex terrain, maintain an offensive focus, utilize non-standard organization and training, and employ surprise, shock action, and speed.

⁶³ Philip Stibbe, *Return Via Rangoon*, (South Yorkshire: Pen & Sword Publishers, 1995), 56.

⁶⁴ Scott R. McMichael, “A Historical Perspective on Light Infantry...”, 43.

CHAPTER 4: EVOLUTION OF CANADIAN LIGHT FORCES

In order to properly frame light forces within the Canadian context, it is critical to examine the evolution of Canadian light forces and consider common themes and factors. Although the light forces tradition could be traced back to the skirmishers and disruption forces of the Greek phalanx armies or the Roman legions, in the interest of a narrower focus, this chapter will examine light forces within the context of Canada's history from the colonial era to the modern era. When examining Canadian light forces history, two sources from Canadian military historians are noteworthy. The first, *Thinking About Light Infantry* by Lieutenant Colonel John A. English, a former member of the Princess Patricia's Canadian Light Infantry, and a distinguished military historian. Taking a broad approach to light forces, English recounts the origins of light infantry and their differences from other types of infantry. The second source, Colonel Bernd Horn's *"We Will Find a Way": Understanding the Legacy of Canadian Special Operations Forces*, analyzes the history of Canadian SOF and notes several similar characteristics and themes throughout their evolution. Although light forces are not SOF, within the Canadian context, there is significant overlap in their common ancestry. By chronologically examining Canadian light forces history, several common themes will be identified.

EUROPEAN AND COLONIAL WARFARE

In the 1740s, European warfare had become excessively strict and mechanical as infantry tactics were fixated on "line and volley fire". The development of skirmishing troops, who had the marksmanship skills to target individuals accurately, became

essential.⁶⁵ These troops could utilize ground to engage the enemy, carry out reconnaissance or conduct delay. The first significant appearance of light troops occurred during the War of the Austrian Succession (1740-1748), whereby early 1741, more than 30,000 light troops were employed on the battlefields of Europe. The effectiveness of these light troops led many other great powers to create similar forces.⁶⁶ Many of the German states created and deployed companies of jaegers, who were first-class woodsmen and excellent marksmen with rifled arms.⁶⁷ Across Europe, the adaptation of light force elements became an essential part of warfare; however, in the overseas colonies, this style of fighting had been in practice for some time.

In colonial North America, French-Canadian raiders and indigenous forces were the genesis of Canada's light forces, through the practice of "la petite guerre". During the colonial struggle for North America, a European theatre focused France, consistently relied on a small group of French-Canadian colonists and their indigenous allies to defend against Iroquois and British forces.⁶⁸ To meet this threat, the French-Canadians utilized small groups of "coureur de bois" or partisans to conduct reconnaissance, raids, and ambushes across the British's depth. Describing the effectiveness of these forces and tactics during the infamous defeat of British Major General Braddock by French-Canadian and indigenous raiders, George Stanley comments:

The English trained in a different style of fighting, could not adapt themselves to these tactics. Frontiersmen were not made in a day. When they could not find the enemy, whose fire came from every tree, the English

⁶⁵ Mir Bahmanyar, *Shadow Warriors: A History of the US Army Rangers*, (New York: Osprey Publishing, 2005), 6.

⁶⁶ John A. English, "Thinking About Light Infantry...", 19.

⁶⁷ *Ibid.*, 19.

⁶⁸ Scott R. Taylor, *Canada at War and Peace: A Millennium of Military Heritage*, (Ottawa: Espirt de Corps Books, 1999), 19.

soldiers lost their proverbial steadiness and imperturbability; those who could took to their heels in an uncontrollable panic.⁶⁹

The French-Canadian and indigenous raiding forces could react faster than those forces conforming to European infantry drill standards. These colonial light forces, with their knowledge of “forest warfare”, were often able to seize the initiative from larger opponents.⁷⁰

Having grown accustomed to the cruel and unforgiving climate of colonial North America, the French-Canadians adapted themselves to thrive in complex terrain. French-Canadian leadership, particularly those who were born and raised in this environment, rejected the classic European style of warfare.⁷¹ They formed groups of regulars, volunteers, and indigenous forces whose combined skills were essential to mission success. The French regulars brought the discipline, organization, and tactical acumen of military training, while the volunteer and indigenous forces contributed marksmanship, and the local and environmental knowledge of their colonial upbringing. As a combined force, this group was able to conduct deep operations throughout the British’s depth and achieve disproportionate effects relative to their size. Commenting on the impact of these forces, Horn states that:

The constant depredations, ambushes, and raids of the Canadians and their Indian allies, caused a constant material and economic drain on the British. But equally important, they created an overwhelming psychological and moral blow against the Anglo-American colonies.⁷²

⁶⁹ George F. Stanley, *Canada’s Soldiers: The Military History of an Unmilitary People*, (Toronto: Macmillan of Canada, 1974), 66.

⁷⁰ *Ibid.*, 66.

⁷¹ Bernd Horn, *We Will Find a Way: Understanding the Legacy...*, 4.

⁷² *Ibid.*, 4.

So effective was the disruption and paralyzing effect of these French-Canadian light forces that the British had to develop a similar capability.

In *Reminiscences of the French War: Robert Rogers' Journal*, the urgent need for an equivalent British light force is described:

The British Generals [were convinced] of their utter inability to operate in America, without the aid of a strong corps of Rangers, composed of the natives of the country, whose knowledge of Indian warfare, would enable them to prevent a similar surprise and overthrow.⁷³

Throughout the 1740s and 1750s, the British Army experimented with light troops in North America by creating ad hoc light companies to respond to the threat posed by the “Indians” and “Backwoodsmen”.⁷⁴ In 1744, one of the first attempts saw the creation of an “independent corps of rangers”, also known as the corps of Nova Scotia Rangers, to respond to the threat posed by raiding indigenous war parties that were aligned with the French.⁷⁵ One of these Ranger companies was led by Captain John Goreham. Goreham’s command was composed of 60 Mohawk and Metis warriors. Familiar with the indigenous way of war, they swiftly engaged the French and their allies. Their success was such that Major-General William Shirley, then Commander-in-Chief of the British Army in North America, wrote, “the great service which Lieut. Colonel Gorham’s Company of Rangers has been of to the Garrison at Annapolis Royal is a demonstration of the usefulness of such a Corps.”⁷⁶ Ultimately, the initial success of these “ad hoc” light companies increased the desire for further employment of British light forces.

⁷³ Robert Rogers, *Reminiscences of the French War: With Robert Rogers journal and a memoir of General Stark*, (New Hampshire: Freedom Historical Society, 1988), xvi.

⁷⁴ John A. English, “Thinking About Light Infantry...”, 19.

⁷⁵ Bernd Horn, *We Will Find a Way: Understanding the Legacy...*, 5.

⁷⁶ *Ibid.*, 5.

More well known was the creation of the legendary Rogers' Rangers, who were tasked with countering the French-Canadian raiders in the strategically vital Lake Champlain region. Able to "scour the woods and ascertain the force and position of the enemy", Robert Rogers' skill and success quickly earned him a reputation for bold incursions into enemy territory.⁷⁷ The reputation and accomplishments of the rangers soon led to British commanders requesting similar light forces to accompany their operations to prevent against French-Canadian and indigenous attacks. British commanders also noted their ability to conduct reconnaissance, navigate, and thrive in the unforgiving climate. Due to the success of these types of units, the British Army would begin the widespread use of "light" or "rifle" infantry across their formations.⁷⁸

The genesis of the Canadian light forces' tradition was the combined history of colonial English, French, and Indigenous warfare. Small groups of soldiers trained to thrive in complex terrain and attack the enemy throughout their depth have set the benchmark for light forces today.

BOER WAR AND THE FIRST WORLD WAR

Following Confederation, Canada would face a light force opponent employing similar tactics to their colonial ancestors. During the South African War (1899-1902), the Boers altered their strategy for the war after suffering a significant loss at Paardeberg. Rather than attempting to halt the British advance with static defensive positions, the Boers concentrated on attacking the British's depth and disrupting their lines of

⁷⁷ Robert Rogers, *Reminiscences of the French War...*, xvi.

⁷⁸ John A. English, "Thinking About Light Infantry...", 19.

communication.⁷⁹ The Boers' strategic end sought to prolong the conflict and drain British resources, ultimately leading to a domestic backlash in Britain and a political settlement with more favourable conditions.⁸⁰ Speaking about this shift in strategy in his article, *Boer Guerrilla and British Counter-Guerrilla Operations in South Africa, 1899 to 1902*, Andre Wessels comments that:

It is ironic that it was only after suffering a serious reversal in the field (Paardeberg) – and losing a capital city (Bloemfontein) – that the Boers started to exploit what was their strongest weapon against a conventionally trained army, namely mobility.⁸¹

The shift in Boer strategy ultimately led to a significant adjustment in the tactical employment of their army and resulted in the adoption of several light forces characteristics.

The Boers utilized the terrain and mobility to achieve repeated surprise and advantage over their opponents. Following tactical action, they would disperse and withdraw to avoid decisive engagement by reinforcements and avoid suffering casualties. The Boers were forced to live off the veldt and make use of captured stores. As they operated throughout the enemy's depth, they had to utilize extensive reconnaissance and intelligence, to maintain greater situational awareness over the British.⁸² The effectiveness of the Boers' light force employment was first demonstrated during the battle of Sannaspos on 31 March 1900. During the battle, Boer General Christiaan de Wet and 1500 Boers engaged and defeated a British force composed of 1800 soldiers. The Boers suffered only three dead and five wounded, while the British suffered at least

⁷⁹ Andre Wessels, "Boer Guerrilla and British Counter-Guerrilla Operations in South Africa, 1899 to 1902," *Scientia Militaria, South African Journal of Military Studies* 39, no. 2 (2011): 6.

⁸⁰ *Ibid.*, 6.

⁸¹ *Ibid.*, 6.

⁸² *Ibid.*, 7.

18 dead, 134 wounded, and 426 captured. During the battle, the Boers achieved complete surprise and dispersed following the battle as quickly as they had arrived.⁸³ The Boers' employment of light forces characteristics continued until the end of the conflict, and ultimately, their change in strategy and tactics succeeded in prolonging the conflict for an additional two years and two months.⁸⁴

The Boer War served as Canada's first overseas deployment of an expeditionary military force, and it began the cultivation of a distinctive Canadian military identity. Through the war, the Canadian government sought to pursue several nationalist objectives and took several steps with their military force, including the organization, naming, and clothing of the battalions, to ensure their Canadian specific uniqueness.⁸⁵ In addition to the changes within the Canadian military in general, the war also saw the continued development of a light force identity, particularly after witnessing the Boers' employment of light forces characteristics to such success. These "Boer tactics" would be experimented with by various countries, including the United States, the United Kingdom, France, and Germany.⁸⁶ For Canada, the Boers' adoption of "light warfare" impacted Brigadier Hamilton Gault's experience during the South African War so much that it drove him to include the title of "light infantry", when founding the Princess Patricia's Canadian Light Infantry in 1914.⁸⁷

Toward the end of the First World War, Canadians faced another challenging light force opponent in the German *Sturmtruppen* units. The First World War saw an

⁸³ *Ibid.*, 7.

⁸⁴ *Ibid.*, 7.

⁸⁵ Carman Miller, "Loyalty, Patriotism and Resistance: Canada's Response to the Anglo-Boer War, 1899–1902," *South African Historical Journal* 41, no.1 (1999): 318.

⁸⁶ John A. English, and Bruce I. Gudmundsson, *On Infantry*, (Westport: Praeger Publishers, 1995), 6.

⁸⁷ John A. English, "Thinking About Light Infantry...", 1.

unprecedented reliance upon firepower and virtually no opportunity for true manoeuvre on the Western Front, with commanders on both sides favouring massive artillery barrages. Both combatants' infantry struggled to employ accurate rifle fire and light machine guns to manoeuvre onto enemy positions, once the artillery support had ceased, due to the early immobility of machine guns. The German's sought to overcome this challenge with the employment of elite stormtrooper units, composed of a four-man light machinegun *trupp* and a seven-man *strosstrupp* assault element. The Germans added high-quality junior leadership to an organization favouring a low ratio of men to weapons. By embedding the training, weapons, and leadership needed to seize opportunities independently and take the initiative, the *Sturmtruppen* units provided a valuable tactical solution to the stalemate of trench warfare.⁸⁸

The *Sturmtruppen* units employed many characteristics of light infantry, including infiltration, dispersion, surprise, and small element initiative. Although small groups or squads of these soldiers would form throughout 1915, the first *Sturm-Batallion* (Assault Battalion) was formed by Captain Willy Rohr in August 1915. The first offensive use of storm troop tactics at the army level were employed during the Battle of Riga on the Eastern Front in 1917. The Germans would also use *Sturmtruppen* forces on a large scale during the Caporetto offensive in Italy.⁸⁹ Throughout their employment, the integration and cooperation with heavy weapons teams were essential. In *On Infantry*, the importance of this *Sturmtruppen* grouping and their role is highlighted:

The framework provided by the heavy weapons units performed three essential services...the first was the suppression or destruction of enemy heavy weapons. The second was the isolation of the area in which the

⁸⁸ *Ibid.*, 21.

⁸⁹ David T. Zabecki, *Germany at War: 400 Years of Military History*. (Santa Barbara: ABC-CLIO, 2014), 1248.

Stosstrups were operating. The third, which was particular to trench warfare, was the sweeping of the surface of the ground through which *Stosstrups* would move. This served to trap enemy troops in their trenches and thus make them vulnerable to one of the definitive techniques of Great War *Stosstruppen* – the ‘rolling up’ of a trench.⁹⁰

Small groups of *Sturmtruppen* rapidly clearing and rolling up enemy trenches also necessitated several changes to their weapons and equipment, including specialized bags for increased grenades and lighter rifles and footwear.⁹¹ Low-level leadership, tactical mobility and integrated firepower were essential elements to this light forces’ success.

Although limited aspects of *Sturmtruppen* tactics would be integrated into French and British armies throughout the First World War, the allies would evolve their tactics to favour the employment of heavy firepower, detailed planning, and attritional engagements. The lone exception, which bore a slight resemblance to *Sturmtruppen* tactics, was championed by French Army Captain Andre Laffargue in his pamphlet, *The Attack in Trench Warfare*.⁹² Despite these similarities, Laffargue’s pamphlet was still focused on the doctrines of mass and firepower. Regarding the Canadian context, despite significant expertise in trench raiding, Canada’s advocacy for anything resembling *Sturmtruppen* tactics would be limited to Sir Arthur Curries’ criticism of “human wave” tactics and advocating for independent maneuver by platoons. Canadian infantry would eventually participate in complex set-piece operations and highly successful mobile operations that broke the German Army during the Hundred Days, but they did not adopt anything that could be identified as *Sturmtruppen* or “light infantry” tactics to do so. It would take some decades for Canada, and many other western nations, to integrate

⁹⁰ John A. English, and Bruce I. Gudmundsson, *On Infantry...*, 20.

⁹¹ Bruce I. Gudmundsson, *Stormtroop Tactics: Innovation in the German Army, 1914-1918*. (New York: Praeger, 1989), 51.

⁹² John A. English, and Bruce I. Gudmundsson, *On Infantry...*, 22.

German concepts like decentralization and mission command. The tactical innovations brought about by the *Sturmtruppen* cannot be understated, as it reinvigorated fire and movement and established the intellectual roots for thinking about mission command and manoeuvre warfare. Speaking about the importance of this innovation, English and Gudmundsson comment, “appearing at first to be a means of dealing with a special case [trench warfare]...this approach [*Sturmtruppen*] was eventually to become the dominant form of infantry combat in the twentieth century.”⁹³

THE SECOND WORLD WAR

There were significant changes in light forces during the period of the Second World War. The German Army continued to refine the traditions of *Sturmtruppen* tactics and focused their infantry on small unit self-reliance and initiative. Two specialized forms of light infantry were introduced – namely mountain and airborne forces. Finally, the creation of Special Operations Forces and their divergence from conventional light forces.

The tactical superiority and core of German infantry tactics were tied to the ability for their infantry squads to manoeuvre. The focus on small unit actions and junior level leadership was a critical component in the German infantry’s ability to manoeuvre and make decisions faster than their opponent. Contrary to Allied propaganda, the German soldier was not an “automaton” and was enabled to display greater individual thought and action than his British or American counterpart.⁹⁴ Similarly, German soldiers had been taught to view war as a “creative activity” and both commanders and

⁹³ *Ibid.*, 13.

⁹⁴ *Ibid.*, 115.

subordinates needed to continually adapt themselves to changing situations.

Summarizing this approach, English and Gudmundsson state:

The doctrine that unified the German Army was not a matter of templates or procedures, but an oral and literary tradition that constantly stressed the importance of resolute and rapid action, cooperation between different arms and units, and the importance of the human element.⁹⁵

This approach would later be adopted into the concept of “Mission Command” and form the basis of most modern armies’ doctrine, particularly for light forces and other types of specialized infantry.

The Second World War saw a significant expansion in the use of light forces and specialized infantry to respond to the challenges posed by complex terrain or other tactical problems. Widespread use of mountain forces during the conflict was first employed by the Germans, and by 1944, the German military included nine Wehrmacht and six Waffen-SS mountain divisions. Extremely versatile, these units were not only employed in the mountainous regions of Norway, the Mediterranean, and the Caucasus, but were found to be the most effective type of force for sustained combat in the forests and swamps of Russia.⁹⁶ The Second World War also saw the debut of airborne forces, and similarly, it was the German’s who would first employ them. German airborne forces were noteworthy for their utility during the invasion of Belgium and the Netherlands and in the capture of Crete. These forces embodied the decentralized and small unit approach and, ultimately, altered the nature of light forces and their method of employment.

In response, the allies worked to develop these specialized light infantry forces as well. Initially, senior Canadian generals saw no reason for Canadian paratroopers, due to

⁹⁵ *Ibid.*, 117.

⁹⁶ *Ibid.*, 95.

a perceived lack of role or purpose for a specialized force in the Canadian context.⁹⁷ Conversely, by the spring of 1942, American and British armies had invested in the concept of airborne forces, and soon airborne paratroopers became a defining characteristic of any modern army.⁹⁸ Not wanting to be left out, Canadian military leaders reversed their earlier decisions, and by 1 July 1942, the Minister of National Defence and the Canadian War Cabinet Committee approved the formation of a parachute unit titled the 1st Canadian Parachute Battalion (1 Cdn Para Bn).⁹⁹

Offensively focused, these paratroopers would embody the aggressive nature and deep operations ability that was characteristic of light forces. Robert Taylor, a reporter for the *Toronto Daily Star*, described the airborne volunteers as “action-hungry and impatient to fill their role as the sharp, hardened tip of the Canadian army’s dagger pointed at the heart of Berlin.”¹⁰⁰ Once deployable, they were attached to the UK 3rd Parachute Brigade, 6th Airborne Division, in March 1943. Throughout the war, 1 Cdn Para Bn earned an exceptional reputation, as they never failed to complete an assigned mission or surrender an objective. Horn describes the 1 Cdn Para Bn achievements:

1 Cdn Para Bn were among the first Allied soldiers to have landed in occupied Europe, the only Canadians who participated in the “Battle of the Bulge” in the Ardennes, and by the end of the war, they had advanced deeper into Germany than any other Canadian unit.¹⁰¹

⁹⁷ Michael Mitchell, *DUCIMUS: The Regiments of the Canadian Infantry*, (St. Hubert, Quebec: Mobile Command Headquarters, 1992), 34.

⁹⁸ Bernd Horn, *We Will Find a Way: Understanding the Legacy...*, 16.

⁹⁹ *Ibid.*, 16.

¹⁰⁰ Robert Taylor, “Paratroop Van Eager to be Tip of Army ‘Dagger,’” *Toronto Daily Star*, 12 August 1942, quoted in Bernd Horn, *We Will Find a Way: Understanding the Legacy...*, 17.

¹⁰¹ Bernd Horn, *We Will Find a Way: Understanding the Legacy...*, 17.

Following the war, they were disbanded on 30 September 1945. Ultimately, 1 Cdn Para Bn exemplified a new stage of the light force capability in Canada and championed an innovative and agile form of warfare.

Along with the creation of specialized light infantry forces, the Second World War also marked the separation and distinction of Special Operations Forces. Within the Canadian context, during the creation of 1 Cdn Para Bn, the Canadian War Cabinet also authorized the creation of 2 Cdn Para Bn. The name of this unit was deception, as it was to be employed as a commando unit. In May 1943, it was changed to the 1st Canadian Special Service Battalion and was Canada's contribution to the joint U.S./Canadian First Special Service Force (FSSF).¹⁰²

The example of the FSSF also highlights the danger of employing a SOF unit in conventional light forces roles. Composed of rigorously selected and highly trained soldiers, the FSSF were originally created for daring sabotage and raiding operations. For several reasons, including resource constraints and higher-level politicking, the force was ultimately employed as highly effective light infantry. In December 1943, the FSSF successfully assaulted a fortified German defensive position atop of Monte La Difensa in Italy. The assault and subsequent defence, to hold and expand their position, inflicted significant casualties to the unit. Unable to recreate the selection process and the extensive training of the original cadre, the FSSF would receive replacements from the normal reinforcement pool, and ultimately dilute their specialty skills. Following subsequent engagements and casualties in Italy and France, causing further dilution of skill, the FSSF were disbanded on 5 December 1944.¹⁰³

¹⁰² Michael Mitchell, *DUCIMUS: The Regiments of the Canadian Infantry...*, 34.

¹⁰³ Bernd Horn, *We Will Find a Way: Understanding the Legacy...*, 23.

The FSSF example highlights the risk of generalizing the employment of SOF and light forces. Although employing similar characteristics, SOF units diverged during the Second World War due to their high level of specialization in recruitment, selection, and training. If SOF are employed in conventional light forces roles, they are likely to incur significant casualties that cannot be replaced quickly or will have to accept replacements that dilute their skill level. The creation of SOF units, such as the FSSF and the Royal Canadian Navy Beach Commandos, saw the separation of conventional light infantry and special operations forces within the infantry domain.

Despite the examples of 1 Cdn Para and the FSSF, Canadian infantry during the Second World War, remained wedded to combined arms operations with armour, artillery, and engineers. Classified as “regular” infantry under Czege’s model, every Canadian infantry division was fully motorized and focused on supporting armour. Throughout the Second World War, Canadian infantry continued their tactical evolution from the First World War, focusing on firepower, combined arms integration, and detailed planning. It would not be until the Cold War, and the integration of German thinking into American and Canadian military theory, that concepts like mission command, decentralization, and manoeuvre warfare would emerge.

THE COLD WAR

Following the Second World War, Canada, as a member of NATO, began preparations for war in Europe against the Soviets. During the Cold War, warfare evolved to include mechanization, manoeuvre, and firepower capabilities that had never been seen to this scale and severity. Armoured warfare was anticipated to be the dominant paradigm in the land domain, and most Canadian Army capability development was oriented towards this. Despite the need to counter the legions of Soviet Armoured

Divisions envisioned sweeping across Europe, Canada still needed a smaller, cost-effective, and rapidly deployable light force capable of meeting the increasingly popular requirements of peacekeeping.¹⁰⁴ During the Cold War era, the light forces tradition would be maintained in the form of the Canadian Airborne Regiment.

The Canadian Airborne Regiment (CAR) was officially established on 8 April 1968 and was designed to provide flexibility to the Canadian Government. Lieutenant-General Jean Victor Allard, Commander of Force Mobile Command (FMC), desired a completely air-portable unit, deployable and able to arrive in an operational theatre within 48 hours.¹⁰⁵ The Canadian Forces Organizational Order (CFOO) stated that, “the role of the Canadian Airborne Regiment is to provide a force capable of moving quickly to meet any unexpected enemy threat or other commitment of the Canadian Armed Forces.”¹⁰⁶ Ultimately, the CAR was ideally suited to meet the needs of the United Nations (UN) ‘stand-by’ role or rapidly deploy to peacekeeping operations. Similarly, the CAR, due to their domestic or international strategic mobility, were ideally suited to respond to natural disasters, demonstrate sovereignty, or conduct deep operations during a general war setting.

The CAR consisted of an airborne headquarters and signal squadron, two airborne infantry commandos (278 personnel each), an airborne field battery, an airborne engineer field squadron, and an airborne service commando. Upon its creation, Lieutenant-General W.A.B. Anderson, Commander of the Army, stated that, “this light unit is going to be very attractive to a fellow who likes to live dangerously, so all volunteers can go into

¹⁰⁴ Peter Kasurak, *Canada's Mechanized Infantry: The Evolution of a Combat Arm, 1920–2012...*, 125.

¹⁰⁵ Bernd Horn, *We Will Find a Way: Understanding the Legacy...*, 30.

¹⁰⁶ *Ibid.*, 31.

it.”¹⁰⁷ The CAR drew exceptional soldiers and officers, ensuring they were experts in small arms, survival skills, and had excellent levels of fitness. As the experienced soldiers were already well practiced in the basics of soldiering, it allowed the CAR to focus on more advanced and specialized skills in the domains of mountain and airborne warfare.

The ability to operate in complex terrain was a key tenant for the CAR. Able to utilize strategic airlift and quickly deploy into complex terrain, the soldiers were able to carry out a variety of classic light forces tasks. In CFP 310 (1) Airborne – The Canadian Airborne Regiment, it states that:

[The] Canadian Airborne Regiment is to be prepared to carry out the following operations for which it is specially trained: disruption of lines of communications, destruction of critical installations; psychological warfare operations; special intelligence tasks; recovery tasks; deception operations; internal security operations; counter-guerrilla operations; and support of indigenous paramilitary forces.¹⁰⁸

The CAR were experts in the conduct of patrolling, raids, and ambushes and provided the Army with a light, airborne or airmobile quick reaction force. The CAR could be used to augment either of the flanking brigades for internal security tasks, to the Arctic, or to UN-type operations.¹⁰⁹

The CAR often struggled for operational deployments, as the Government of Canada did not want to task its strategic reserve, nor did the CAR have the requisite mobility for several types of missions.¹¹⁰ Despite these challenges, the CAR was employed during the Front de la Liberation du Quebec (FLQ) Crisis in October 1970 in

¹⁰⁷ *Ibid.*, 31.

¹⁰⁸ *Ibid.*, 34.

¹⁰⁹ Michael Mitchell, *DUCIMUS: The Regiments of the Canadian Infantry...*, 37.

¹¹⁰ Bernd Horn, *We Will Find a Way: Understanding the Legacy...*, 32.

Montreal, Quebec. As well, in 1974, they were deployed to Cyprus in response to the Turkish invasion. Lastly, in response to UN Security Council Resolution 794, the CAR was deployed to Somalia as part of a peacekeeping operation. The Regiment's work in theatre was effective, and they received high praise for their effort. Most notably, Hugh Tremblay, the Director of Humanitarian Relief and Rehabilitation in Somalia, stated, "If you want to know and to see what you should do while you are here in Somalia go to Belet Huen, talk to the Canadians and do what they have done, emulate the Canadians and you will have success in your humanitarian relief sector."¹¹¹ Despite this success, and due to a series of disciplinary and leadership failures, culminating in the murder of a Somali national who was caught stealing in their camp, the CAR would be disbanded in January 1995.¹¹²

With the disbandment of the CAR, the light forces tradition and experience would be dispersed across the Canadian Forces. Although not embodying all the characteristics of a pure SOF unit, the former members of the CAR would also have a critical future role in the development of modern Canadian SOF organizations.¹¹³

MODERN CONFLICT

With the dispersion of the light forces' tradition and experience due to the disbandment of the CAR, a new home was found within the 3rd Battalions of each of the Regular Force Canadian Infantry Regiments in the latter half of the 1990s. Throughout each of the three Regiments' histories, the Royal Canadian Regiment (RCR), the Royal 22e Régiment (R22eR), and the Princess Patricia's Canadian Light Infantry (PPCLI),

¹¹¹ *Ibid.*, 34.

¹¹² *Ibid.*, 35.

¹¹³ *Ibid.*, 36.

there has been little difference between battalions in terms of equipment, role, and employment. It would not be until the conflict in Afghanistan, the introduction of the LAV III, and the subsequent mechanization of the 1st and 2nd Battalions, that divergence in organization and role would occur.

A Canadian infantry battalion's role is to close with and destroy the enemy, but a light infantry battalion is trained to do this through a variety of insertion methods (parachute, helicopter, vehicle, boat, and most importantly by foot) and in a variety of complex terrain (e.g. urban, mountains) that would prove difficult for mechanized forces.¹¹⁴ This divergence was most pronounced during the conflict in Afghanistan against the Taliban and Al Qaeda. In 2002, as part of Op APOLLO, Canada's contribution to Op ENDURING FREEDOM following the September 11th terrorist attacks, 3 PPCLI Battlegroup (BG) deployed to Afghanistan to clear the mountainous regions of Taliban and Al Qaeda fighters. Between 4 February and 30 July 2002, the 3 PPCLI BG maneuvered through complex and heavily mined terrain and operated under harsh weather conditions to clear and destroy a number of cave complexes. They conducted three challenging air-assault operations, as the terrain largely restricted the employment of any type of mechanized vehicle. For their exemplary performance during these operations, 3 PPCLI was awarded the Commander-in-Chief Unit Commendation.¹¹⁵

¹¹⁴ Canada, "Third Battalion Princess Patricia's Canadian Light Infantry," last accessed 2 April 2020, <http://www.army-armee.forces.gc.ca/en/ppcli/3rd-battalion.page>

¹¹⁵ Canada, "Canadian Armed Forces in Afghanistan – Mission Timeline," last modified 9 April 2014, <https://www.canada.ca/en/department-national-defence/services/operations/military-operations/recently-completed/canadian-armed-forces-legacy-afghanistan/mission-timeline.html>

As a result of the deployment of the Canadian contingent to Kandahar in 2006, the Canadian mechanized infantry battalions formed the core of the Canadian Battlegroup. As a result of their lack of LAV IIIs, the 3rd battalions were often left to provide augmentations to the BGs or fill other roles. One of the most notable roles filled by the light battalions was that of the Operational Mentoring and Liaison Teams (OMLT). Realizing that the only sustainable solution to the conflict was to have western forces hand over security responsibilities to competent Afghan National Security Forces (ANSF), NATO set about conducting Security Force Capacity Building (SFCB) operations by training and employing OMLT teams across Afghanistan. The teams functioned similarly to that of the United States' Embedded Training Teams (ETT) and provided training and mentoring to the ANSF. As well, they served a critical liaison capability between Afghan and ISAF forces through the coordination and planning of operations and ensuring that the Afghan forces received proper close air support, casualty and medical evacuation.¹¹⁶ The Canadian LIBs, having focused on skills such as marksmanship, fieldcraft, and patrolling, were ideally suited to teach the Afghan soldiers, who lacked any significant mechanized or armoured force. Similarly, the LIB soldiers had the physical robustness and endurance to keep pace with a far lighter Afghan soldier on long-distance patrolling operations. Despite their inability to form a component of the mechanized BG without significant retraining, the LIBs found a niche role within the OMLT to help develop the capacity of ANSF.

¹¹⁶ Canada, "Joint Task Force Afghanistan," last accessed 2 April 2020, <https://www.canada.ca/en/department-national-defence/services/operations/military-operations/recently-completed/operation-athena/joint-task-force-afghanistan.html>

Following the end of Canada's mission in Afghanistan, the LIBs have subsequently force generated elements for a variety of missions, including rapid response to Russian aggression, as part of Op REASSURANCE in Eastern Europe, and several force protection and SFCB training missions throughout Africa and the Middle East.¹¹⁷ Ultimately, the light forces tradition in Canada has evolved from Colonial fighters, thriving in the harsh Canadian environment to gain an advantage over their adversary, to our modern context of professionalized soldiers able to deploy across the globe rapidly.

Throughout Canadian light forces history, several patterns and commonalities are identified. Exemplified by the colonial skirmishers and rangers, but common throughout Canadian light forces history was the ability to thrive and maneuver in harsh conditions and environments. Every light force sought to utilize the environment to their advantage as a safe haven or means to infiltrate against their enemy. As well, all generations of light forces were inherently offensively focused and displayed aggressiveness and audacity in their operations. This was embodied in the operations of 1 Cdn Para during the Second World War or the modern actions of 3 PPCLI during Op APOLLO. Further, every generation of Canadian light forces utilized a non-standard means of organization and training that somewhat departed from the norm of the time. This non-standard approach could be characterized by the mixed groupings of colonial light forces or the adoption of lessons learned during the Boer or First World War. Lastly, the employment of surprise, shock action, and speed was critical to their success. Each generation of light forces utilized these characteristics, and they seemingly remain timeless.

¹¹⁷ Canada, "Current Operations List," last accessed 2 April 2020, <https://www.canada.ca/en/department-national-defence/services/operations/military-operations/current-operations/list.html>

CHAPTER 5: CANADIAN LIGHT FORCES CONSIDERATIONS

After exploring a number of subjects related to light forces in general, it is critical to examine the topic within the context of the current Canadian Armed Forces. As the Canadian Army continues to build upon the Light Forces Initiating Directive, there will be several domains that need careful consideration. How do you employ light forces in a medium weight army in operations across the spectrum of conflict? In a time of restricted funding and manning, how should a light force optimize its organization and training to maximize operational readiness? Lastly, given the long and complex military procurement process, how can the light force ensure it is adequately equipped to face their unique and challenging environment? These questions will need to be answered by the Canadian Army, in order to maintain the momentum of the Light Forces Initiating Directive and operationalize Canadian light forces. This chapter will examine Canadian light forces, specifically examining employment, organization and training, and procurement considerations.

EMPLOYMENT CONSIDERATIONS

Highlighted in the article, *The Future British Airborne Force*, a poor understanding of a specialized military force often leads to misinterpretation of risk, improper employment, and non-usage heading toward insignificance.¹¹⁸ Given the inherent lack of armoured protection and dangers associated with deep operations, light forces are often viewed with an inflated level of risk, particularly given the growing social expectation of zero-casualty operations. In *Strong, Secure, Engaged: Canada's*

¹¹⁸ Lewis, "The Future British Airborne Force," *Wavell Room*, last accessed 2 April 2020, <https://wvellroom.com/2018/08/28/future-british-airborne-force-part-2/>

Defence Policy, the Canadian Army declares itself as an agile, scalable and responsive force, able to provide the Government with a range of military capabilities.¹¹⁹ The light force provides the Canadian Army its most rapidly deployable option, but the disconnect between this capability and the expectation of zero-casualty operations may negatively affect the opportunity risk balance. The misperception of the increased risk of light forces can be corrected through the improved inclusion of light force operations in Professional Military Education (PME).¹²⁰ Currently, Canadian Army PME is heavily focused on the medium weight Mechanized Brigade construct, and exercises struggle to include meaningful applications of light forces. Similarly, the Canadian Army lacks true light forces doctrine that addresses the nature of fighting in complex terrain across the spectrum of conflict. Combining the experiences of the Canadian Airborne Regiment and several infantry battalions during the Afghan conflict (notably 3 PPCLI's during Op APOLLO), there is significant light forces operational experience in low to medium intensity conflict.¹²¹ This experience should be captured in modern light forces doctrine and combined with the evolving nature of Hybrid, Grey Zone, and competition warfare. By increasing the amount of light forces' content in PME and revitalizing light forces' doctrine, future commanders will become better able to employ them on the battlefield, as well as make more accurate assessments of risk.

As well, the risk misperception can also be corrected through increased utilization.¹²² Greater use of light forces on actual operations will provide increasing

¹¹⁹ Canada, Department of National Defence, *Strong, Secure, Engaged: Canada's Defence Policy...*, 36.

¹²⁰ Lewis, "The Future British Airborne Force...", 1.

¹²¹ Alex D. Haynes, "The Force Employment Concept and the Infantry: A Proposal...", 41.

¹²² Lewis, "The Future British Airborne Force...", 1.

levels of reassurance for senior military and political leadership and lead to a more accurate understanding of risk. This could be executed as a Canadian light element deploying with a larger Canadian mechanized force, or by contributing Canadian light forces to a multinational light force organization. In order to optimize light forces' employment, increasing understanding across the Canadian Army is essential to overcome the misinterpretation of risk.

The second employment consideration related to poor understanding is improper employment. Exemplified in the Chindits case study, the proper employment of light forces is essential to their combat effectiveness. During medium to high-intensity conflicts, the effective use of light forces in open terrain will be severely constrained. Conversely, in complex terrain, such as the mountainous terrain of the Korean War or the Italian campaign during the Second World War, military commanders will likely have more opportunities for employment than light forces available.¹²³ Despite commanders acknowledging the ideal employment of light forces, history demonstrates that commanders are unlikely to leave light forces untasked, waiting for the ideal employment scenario, when the demands of combat present themselves. Light forces are often high-quality units, and if they are available, military commanders are likely to employ them optimally or sub-optimally. Although the misuse of light forces is unfortunate, allowing units to remain idle, when so many vital tasks exist, can be equally costly.¹²⁴ Often commanders will have no choice but to employ light forces outside of their optimal role or utilize them as regular infantry. An example of this was in December 1944, when

¹²³ Scott R. McMichael, "A Historical Perspective on Light Infantry...", 233.

¹²⁴ *Ibid.*, 233.

General Bradley utilized XVIII Airborne Corps to halt the German counteroffensive in the Ardennes.¹²⁵ Although it was not optimal employment of an airborne unit, the demands of the conflict necessitated the decision. In order to minimize the frequency of light force misemployment, it is critical for commanders to have a clear understanding of light force employment considerations across the spectrum of conflict.

The final employment consideration related to poor understanding is non-usage. In an age of fiscal constraint, non-usage perhaps represents the greatest threat to the light force. If a military capability makes itself too unique or specialized, that it can only operate in a specific type of terrain or against a specific type of enemy, it has put itself on the path to degeneration and insignificance.¹²⁶ The Canadian light force needs to ensure it can operate in nearly all types of terrain, across the spectrum of conflict, and are fully integrated into the Canadian Mechanized Brigade construct. During high-intensity conflicts against Malign State Actors (MSA), light forces are ideally suited to conduct deep offensive operations in complex terrain, or in the defence, conduct layback and spoiling attacks. In medium intensity conflicts, light forces can conduct Counter Insurgency Operations (COIN) against Violent Extremist Organizations (VEO). In this type of conflict, light forces would be tasked to patrol in complex terrain, and target enemy safe havens. These types of operations were demonstrated by Canadian light forces during Op APOLLO in the early days of the Afghan conflict. Lastly, low-intensity conflict would see light forces engaged in Security Sector Reform (SSR) activities, such as Security Force Capacity Building (SFCB) and other peacekeeping responsibilities.

¹²⁵ *Ibid.*, 233.

¹²⁶ Lewis, "The Future British Airborne Force...", 1.

Light forces remain the Canadian Army's most expedient means to deliver a relatively large force directly into a theatre or objective area. In terms of employment, it provides the Canadian government with rapid global reach and at a relatively cost-effective military capability.

ORGANIZATION AND TRAINING CONSIDERATIONS

As discussed earlier, it is not the organization of a force that makes it light, but rather it is their characteristics and method of operation.¹²⁷ Light forces must frequently tailor aspects of their organization to suit the nature and context of their operating environment. This often includes the delegation of authority for decision making to the lowest level to facilitate dispersed operations. Enabling lower-level decision making is critical, as due to complex terrain and the nature of light force operations, elements of the chain of command may be dispersed, out of contact, or have less accurate information. Another factor that affects organization is the historical tendency for light forces to become heavier.¹²⁸ This often occurs as military commanders seek to enhance the light force with increased force protection, firepower, or mobility, but this tendency needs to be curtailed when it becomes uncontrolled. Once a light force becomes too inflexible and cumbersome, it has become unsuited for the purposes for which it was designed.¹²⁹

Responding to these organizational considerations, the Light Forces Initiating Directive captured four key characteristics of Light Force development. These development characteristics include: (1) A Purpose-built, scalable and agile organisation; (2) The capability to generate fighting power without dependency on armoured fighting

¹²⁷ Scott R. McMichael, "A Historical Perspective on Light Infantry...", xii.

¹²⁸ *Ibid.*, 234.

¹²⁹ *Ibid.*, 234.

vehicles; (3) Increased strategic and operational responsiveness; and (4) A force structure that ensures the tactical mobility required to operate in selected unique environments.¹³⁰ By explicitly highlighting the needs for the light force to be purpose-built, scalable and agile, the Canadian Army has ensured the force is tailored to the operating environment and can delegate decision making to the lowest level when required. Similarly, by focusing on tactical mobility and fighting power, without dependency on armoured vehicles, the directive ensures that the amount of heaviness applied to the light force is limited. The challenge for Canadian light forces is finding the optimal balance of force protection, firepower, and mobility. Currently, the light force has a gap in mobility between the flexible all-terrain option of man and ATV portable, versus the B-Vehicle fleet that is tied to road or trail networks. Finding the optimal Light Utility Tactical Vehicles (LUTV) will be crucial to enabling Canada's light force. Once the proper organization of Canada's light force is achieved, the refinement of their training will be critical.

Training considerations for the Canadian light force will not be a significant departure from the current practices. As evidenced in the previous chapters, by the key light force's characteristics and the Chindits example, a strong focus on the fundamentals of marksmanship, fieldcraft, and crossover of specialty skills are essential. In addition to a strong baseline of core infantry skills, significant effort needs to be made on cultivating and encouraging lower-level initiative. The operating environment for light forces' soldiers is dynamic and complex. Therefore, superiors need confidence in their subordinate commanders, and subordinate commanders need confidence in themselves to

¹³⁰ Canada, Canadian Army Headquarters, *Light Forces (LF) Initiating Directive...*, 3.

be able to effectively and rapidly make key decisions. This type of shared confidence is most quickly and efficiently built through experience and collective training. The establishment of a strong baseline of core infantry skills, coupled with training designed to empower lower-level initiative, is critical to the effectiveness of a light force organization.

Due to the variety of complex environments that light forces may be called upon to operate in, the maintenance of a cadre of specialists is critical to enabling this capability. It is unrealistic for a light forces soldier to be an expert in all manner of complex terrain, such as mountains, jungles, forests, marshlands, and urban. Similarly, light force soldiers cannot all be experts in specialty insertion methods, such as airborne or amphibious. The current practice of maintaining cadres of specialists within each light force battalion is the most practical means of preserving capabilities, until a greater demand is identified. For example, in 3 PPCLI, the battalion holds a single mountain company and a single parachute company, each charged with maintaining and championing that capability. If an operational need was identified for either of those capabilities in a much larger scale, the specialist company could quickly train the remainder of the battalion, in order to achieve a broad baseline operating capacity for that skill. In this way, a large number of specialist capabilities can be maintained, while still operating within the Canadian Army's economic and personnel constraints. The maintenance of specialty skills can also be enhanced through partnerships with key international allies.

Across the spectrum of conflict, the current operating environment is most often characterized by the employment of a multinational coalition. As a result, Canadian light

force's interoperability with key international allies will be a critical requirement for future success. As exemplified in Canada's response to the 9/11 Terrorist Attacks, light forces and SOF are likely to be the first military capabilities employed in a new theatre. Similarly, the Canadian government is unlikely to take unilateral military action and will often support American led coalitions. Given both of these facts, Canadian light forces should seek increased training and familiarity with the United States Military's Immediate Response Force (IRF) and Special Purpose Marine Air-Ground Task Force – Crisis Response (SP-MAGTF-CR) as they represent ideal partners and the likely nucleus of any emergent multinational headquarters.¹³¹

Similarly, in lower-intensity conflicts where the multinational coalition is engaged in Security Sector Reform (SSR) and/or Security Force Capacity Building (SFCB), partnership with the British Army's Specialised Infantry Groups (Spec Inf Gp) may prove incredibly useful. The Spec Inf Gp are structured and trained to advise, assist, and train partner forces across the world. As well, the Spec Inf Battalions are assigned regional focuses (ex. Sub-Saharan Africa), which allows them to specialize in linguistic and cultural considerations, as well as foster positive relationships after subsequent deployments.¹³² As the Canadian Army lacks the resources and mass to invest in regional focuses for selected units, leveraging the Spec Inf Gp as a training partner, once a mission has been identified, could present a valuable opportunity. Canadian light force

¹³¹ Chad Garland, "This is why we exist": Army paratroopers speed to Middle East in rapid response to increased Iran threat," *Stars and Stripes*, last accessed 2 April 2020, <https://www.stripes.com/news/us/this-is-why-we-exist-army-paratroopers-speed-to-middle-east-in-rapid-response-to-increased-iran-threat-1.613111>

¹³² United Kingdom Army, "Specialised Infantry Group," last accessed 23 October 2019, <https://www.army.mod.uk/who-we-are/formations-divisions-brigades/6th-united-kingdom-division/specialised-infantry-group/>

soldiers could conduct training tailored to SFCB and the specific region in which they are about to deploy. The Canadian Army has yet to develop a comprehensive approach to train soldiers for SFCB missions and leveraging the work of close international allies could be valuable.

PROCUREMENT CONSIDERATIONS

Light forces leaders are often skeptical and cautious about the procurement process and the employment of new technology.¹³³ This mentality relates to the historical tendency for light forces to become heavier, potentially to their detriment. Just because a technology exists does not necessarily mean it should be employed by light forces. Complex terrain, and its second-order effects, can severely impact the employment of certain technology. Ultimately, if equipment cannot be man packed and endure the rigours of the light force's environment, it is of little value.¹³⁴ Equipment must conform to the nature of light forces employment and not the reverse. Therefore, during the statement of requirements and evaluation phases of the procurement process, it is essential that close contact with the field force is maintained. This must go beyond mere surveys and emails to overtasked unit-level leadership, but rather actual face to face engagements with junior-level specialists must occur. As previously discussed, junior-level leadership and the specialist cadres are a central part of the light force, and a procurement process that bypasses their insight is doomed to fail. The needs of dispersed groups of light forces soldiers in complex terrain can only be accurately identified by those that endure their hardships.

¹³³ Scott R. McMichael, "A Historical Perspective on Light Infantry...", 231.

¹³⁴ *Ibid.*, 234.

Similarly, the procurement process must be adaptable to suit the needs of varying complex terrain. Light force soldiers who specialize in mountain warfare will have significantly different requirements than those who specialize in amphibious or jungle warfare. The light force procurement process will need to find an appropriate balance between an economical “one size fits all” approach, compared to every soldier having a personalized locker full of equipment for every circumstance. The solution space likely resides in the specialist cadres themselves, in that small quantities of the requisite equipment can be procured, tested, and adjusted, so that when a greater demand is identified, the equipment requirements are already validated.

This not only applies to the basic soldier level, but for light force commanders and headquarters as well. As Canada’s Medium Weight Army continues to move towards digitization, its procurement and technological systems must account for the nature of combat in complex terrain. Large, heavy, and power-hungry digital command and control (C2) systems will generate a significant burden for light force headquarters. Light force digitization and procurement must account for critical factors such as weight, size, durability, and power consumption. If the Canadian Army fails to ensure proper digitization of light force headquarters, they will either lose their tactical mobility, due to burdensome systems, or be forced outside the digital network and miss potentially critical information.

Large scale procurement projects should continue to focus on the basics of soldiering, but need to account for the unique requirements of light forces. Chief among these unique requirements are flexibility and weight. Depending on a soldier’s role, they have varying equipment requirements. As an example, regarding the chest rig, a platoon

commander has different requirements compared to a radioman, medic, or light machine gunner. Adopting a modular approach to chest rigs, similar to that of the United States Army, would achieve the necessary flexibility as it allows soldiers to task tailor their equipment to their needs. The Canadian Army has already experimented with this flexible approach with its recent combat boot policy. Within the light forces' context, soldiers operating in the mountains are now able to utilize boots different from those operating in the jungle.

Regarding the second requirement of weight, all procurement projects should seek to reduce the load soldiers are required to carry. The weight carried by infantrymen has plagued militaries throughout history. English and Gudmundsson describe the impact of weight on the Normandy landings:

Most infantry in the leading waves were, in fact, criminally overloaded. The American soldiers carried more than eighty pounds...British and Canadian troops...were weighed down with roughly the same load. So laden, soldiers wounded before they reached dry land often drowned. Even those that made it to shore were so weighted down by water and kit that they lacked even the strength to keep ahead of the tide, which moved inland at the pace of a slow walk.¹³⁵

In the domain of load reduction, CANSOFCOM has already conducted significant trials and evaluations and is employing lightweight body armour, sleeping systems, food, and communications equipment. Excessive weight carrying reduces the combat effectiveness of soldiers and can increase the risk of injury. The light forces procurement system should leverage the work done by CANSOFCOM and put this lightweight equipment in the hands of soldiers.

¹³⁵ John A. English, and Bruce I. Gudmundsson, *On Infantry...*, 113.

Lastly, the light forces procurement system needs to ensure that sufficient quantities of basic equipment are available for every soldier. Significant gaps in basic equipment, such as night fighting gear and General-Purpose Machine Guns (GPMG / C6), negate essential capabilities for the light force to train. The guiding practice for light forces procurement is that technology and equipment must be tailored to the needs of the light force and be available in sufficient quantities to facilitate concurrent operations and training. In *A Historical Perspective on Light Infantry*, McMichael comments on the importance of light forces procurement and technological innovation:

It should lighten the soldier's load, enhance his mobility, reduce his logistic problems, compensate for his weaknesses, nullify the enemy's advantages, but never alter the basic nature of the light infantry's attitude of self-reliance.¹³⁶

Light forces must ensure equipment procurement and technological innovation does not generate an overreliance and ultimately negate the light forces greatest strengths. The procurement of equipment that lacks flexibility and/or increases a soldier's weight must be examined with significant scrutiny.

¹³⁶ Scott R. McMichael, "A Historical Perspective on Light Infantry...", 231.

CHAPTER 6: SUMMARY AND CONCLUSION

The Light Forces Initiating Directive generated significant momentum within the Canadian Army to examine light forces and their role within the Canadian Armed Forces. The future security environment will be fraught with conflict and challenges that an agile and well-trained Canadian light force is ideally suited to address. By examining the differences between light forces and other types of infantry, analyzing the key light forces characteristics and reflecting on Canada's light forces' history, several key light forces' considerations were revealed that are vital to the employment of Canadian light forces in the future security environment.

Firstly, through the examination of Colonel Czege's *Three Kinds of Infantry model*, the distinction between light forces and other types of conventional infantry (armoured and regular) became more evident. Through an enhanced understanding of the differences in roles, capabilities, and requirements of the three types of infantry, military commanders are able to ensure the optimal employment of their light forces. It is important to note that given the Canadian military funding and resource management constraints, a significant crossover of assigned tasks across the spectrum of infantry will still need to occur. What is critical is that military commanders are able to acknowledge the risks associated with out of role employment and make these decisions knowingly, as the nature of each type of infantry is not just defined by their structure and equipment, but also their mindset and way of viewing a tactical problem.

Secondly, the Chindits' case study reinforces the importance of the light force key characteristics, namely (1) the ability to thrive in complex terrain; (2) offensive focus; (3) non-standard organization and training; and (4) use of surprise, shock action, and speed.

The Chindits adopted and propagated a unique mindset that shaped how they viewed the environment and tactical problems. By embracing the value of complex terrain, the Chindits were able to challenge the Japanese superiority in jungle warfare. As well, the Chindits provided excellent examples of both effective and ineffective employment of light forces, demonstrating the importance of military commanders understanding light forces. When employed correctly, the Chindits were able to occupy a considerable amount of Japanese forces, and conversely, ineffective employment caused significant Chindit casualties. Ultimately, the Chindits had a profound impact on enemy and friendly forces and demonstrated the effect light forces could have on the battlefield.

Thirdly, by examining Canadian light forces' history, several patterns and commonalities were identified. Common throughout Canadian light forces history was a unique mindset that focused on the ability to thrive and maneuver in harsh conditions and environments. All generations of light forces utilized this inherently offensively focused mindset and displayed aggressiveness and audacity in their operations. This mindset is what defined them as light forces and therefore, each generation utilized non-standard means of organization and training to achieve the optimal employment conditions. Although Canadian light forces' history spans a wide range of forces and environments, each generation embodied similar characteristics and an aggressive light forces mindset.

Lastly, by examining several light forces considerations related to employment, organization and training, and procurement, a number of key recommendations for the continued implementation of the Light Forces Initiating Directive were identified. First, the recognition that light forces are less about their organization and equipment, and more about their mindset and way of evaluating a tactical problem. The Canadian Army

must align themselves with McMichael's view of light forces, which sees the distinction based upon attitude and tactical style, rather than organization. This view must permeate all facets of light forces, including their employment, training, and procurement. The building of this culture and mindset is vital to the future employment of Canadian light forces. The second key recommendation calls for increased light forces understanding within the Canadian Army and CAF, in order to support the future employment and success of Canadian light forces. Increased understanding leads to a corresponding increase in effective decision-making regarding employment and risk. By ensuring that light forces are included in professional military education and training and revitalizing light forces doctrine, the Canadian Army can help maintain the momentum started with the Light Forces Initiating Directive.

Light forces will remain the Canadian Army's most expedient means of delivering a large conventional force to a theatre of operations. In order to achieve the standard of an "agile, scalable and responsive" Canadian Army, as set out in *Strong, Secure, Engaged: Canada's Defence Policy*, continued light forces' advancement is required. The future security environment will be plagued with conflicts and operational requirements in complex terrain, and the Canadian Army must ensure that it has adopted the requisite light forces' mindset and understanding to meet this challenge.

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