



# Design

**Learning and Knowledge Development Processes for the  
Development of Concepts at the General Staff Headquarters  
and the Major HQ Levels**

**November 2015**

## **PREFACE**

1. Design is a learning process of the commander of the military (Chief of Staff) or the commander of a major HQ (regional command like Northern Command or service like the Air Force), and its purpose is to build a concept for force employment and to direct planning, in order to handle a challenge or an operational problem in a given context.
2. The purpose of this document is to present the principles and stages in the implementation of Design.
3. The core method (illustrated in this document through the development of the operational concept, referred to in this document as the campaign concept) is a process of joint learning for the [IDF] General Staff Headquarters and the regional commands regarding a rival system or theater of war, in which:
  - A. The General Staff HQ leads the learning process in cooperation with a major HQ
  - B. The major HQ researches and formulates a campaign concept applicable to the entire theater with which it is dealing, and not only in relation to narrower boundaries of the regional command.
  - C. As the process matures, it will be brought up for discussion before the General Staff HQ. After that discussion, the adopted concept will be compiled, and the General Staff HQ will publish the binding concept.
  - D. This concept is the foundation for the campaign planning process (for details see the instruction "Design and Planning within General Staff Headquarters").
4. The chapters of this document present the following subjects:
  - A. The need for learning processes, the difference and the connection between them and the existing planning process, the General Staff HQ as "learning system."
  - B. Principles of the Design process.
  - C. The four stages of the Design process.
  - D. The link between the operational concept and plans.
  - E. Principles for a follow-on process of vetting the concept from the time of its creation, in order to identify a need to update it.
5. This document was written at the Dado Center, and is based on knowledge accumulated in a brigadier generals course, in recent IDF operational knowledge development processes and more.

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## Introduction

### 1.1 General

- A. The IDF faces an environment characterized by unceasing change processes. These processes accelerate, emerge and change direction. There is another challenge beyond the environment's natural change processes – the competition over learning and implementation between us and our enemies. From one conflict to the next, we meet enemies who are increasingly ready, sophisticated, and self-confident. **Therefore the main challenge we are facing as an organization is the challenge of learning and changing.**
- B. This concept deals with the **Design process, whose essence is learning and knowledge development** and whose product is **a concept for a campaign or campaigns**.<sup>1</sup> Design is the first stage in a broader process that includes Design and Planning, whose outcome is a **plan**. The link between the stages is detailed in the J-3/Doctrine and Training instruction: 'Design and Planning at General Staff HQ' (1.11).
- C. The Design process presented here is not a detailed and binding doctrine. It is intended to serve as a common conceptual and procedural foundation for all IDF entities, as well as a basis for continued learning and the development of the process itself.

### 1.2 The theoretical premise of Design

- A. The Design process presented here is part of a broader system of professional reference documents that should be consulted to understand the process. The document "**An Introduction to Operational Art**"<sup>2</sup> is the major one. It rests on the systems approach<sup>3</sup> and its military implementation – the world of the operational art. In summary, the essence of (systemic) operational art is the ability to learn the changes in the environment, to understand the required strategic trends, and to present a conceptual

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<sup>1</sup> **Campaign** – In both meanings that appear in the (new) doctrine terminology. – 1. Campaign – [at the level of military strategy and campaign] **A conceptual framework** that outlines an action against an actual problem (concrete) and its linkage. 2. A series of operations, efforts or tactical battles **linked to one another by organizing logic**, by way of purpose and a central idea, required outcomes defined through tasks coordinated in time and space. The campaign is aimed to obtain a strategic objective.

<sup>2</sup> Doctrine and Training, Dado Center, **Systems thinking – an introduction to operational art**, Tishrei 5775. Doctrine and Training – Dado Center, October 2014

<sup>3</sup> **Systems approach / systemic approach** – An approach that emphasizes the importance of **the analysis of systems as whole**, and not as a collection of components. The whole is larger than the sum of its parts, in order to understand the whole, the tensions and relations between the systems' components have to be studied, the system is dynamic therefore the change is the foundation in the systems' approach. Therefore, any link is unique and new, the observer (us) is always a component of the system, and not separate from it. To expand on the subject see - **Systematic thinking – systems approach: history, principles and practices of systematic thinking**, Tishrei 5775. Doctrine and Training – Dado Center, October 2014.

framework of a campaign – a systemic idea that enables implementing strategy by way of building and employing force and frameworks that are adapted to the changing environment.

- B. At the heart of theoretical approach of the Design process is the idea that developing a concept for the use of force is what allows initial strategic ideas to form into clear strategy on one hand, and what allows familiar tactical patterns to change and adapt themselves to the changing environment. Concept development is done through the tension between the two aforementioned environments (tactics and strategy) and a conscious and critical<sup>4</sup> learning effort whose concern is the formation of a concept that suits both the needs and strategic aspirations as well as the existing tactical capabilities, or those that are reasonable to strive for.

### **1.3 The distinction and the connection between Design and Planning**

- A. Design is the mechanism of critical examination and change. This process examines our previous basic assumptions and working assumptions and opens them up for discussion. The completion of this process requires time and effort, and is intended to provide a campaign concept.
- B. Planning is an applied learning mechanism. For it to be effective, Planning is based on approved assumptions: a campaign concept for a defined problem or task, the military doctrine, the understanding of reality we have previously developed (enemy, environment etc.) and operational lessons learned.
- C. These two processes – Design and Planning - actually maintain a relationship of complementary dialectics between them: The former allows effective action, at the cost of accepting basic assumptions without dispute; the latter preserves the IDF's relevance over time, at the cost of relatively slow and complex learning. Design enables the formation of a concept, which in turn facilitates planning processes. Therefore both of these processes must always be maintained, simultaneously, while paying attention to the distinct and different instances of each one.

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<sup>4</sup> Criticism – the ability to expose our own assumptions and beliefs and discuss their relevance in relation to the change in the environment.

#### 1.4 Goals of the Design process

- A. To identify a need for conceptual change in the face of changes in the environment.
- B. To develop a strategic<sup>5</sup> framework in relation to the changes in the environment.
- C. To formulate a campaign concept for the employment of force – an idea that includes the all-encompassing explanation for the way the campaign concept will serve the strategic framework that was developed and will implement it.<sup>6</sup> The campaign concept will reflect back to the strategic framework and formulate it into a real strategy (a strategy with a plan for implementation). The campaign concept will also influence aspects of implementation at the execution level - the tactical - and enable the planning of task forcing, weapon systems, command and control frameworks, and new organizations – changes that will serve the campaign plan that was developed.
- D. In light of the above, the concept, as a product of the process, must include:
  - 1) A clear explanation of the way it serves the **strategic** needs and interests of the state.
  - 2) **Campaign principles** – A clear form of action and implementation that will enable detailed practical planning of force organization, force design, and force employment for the purpose of implementation.
  - 3) A logical structure - clear and well-explained - that will enable future critical examination of the concept in light of the changes in the environment that will occur down the road.

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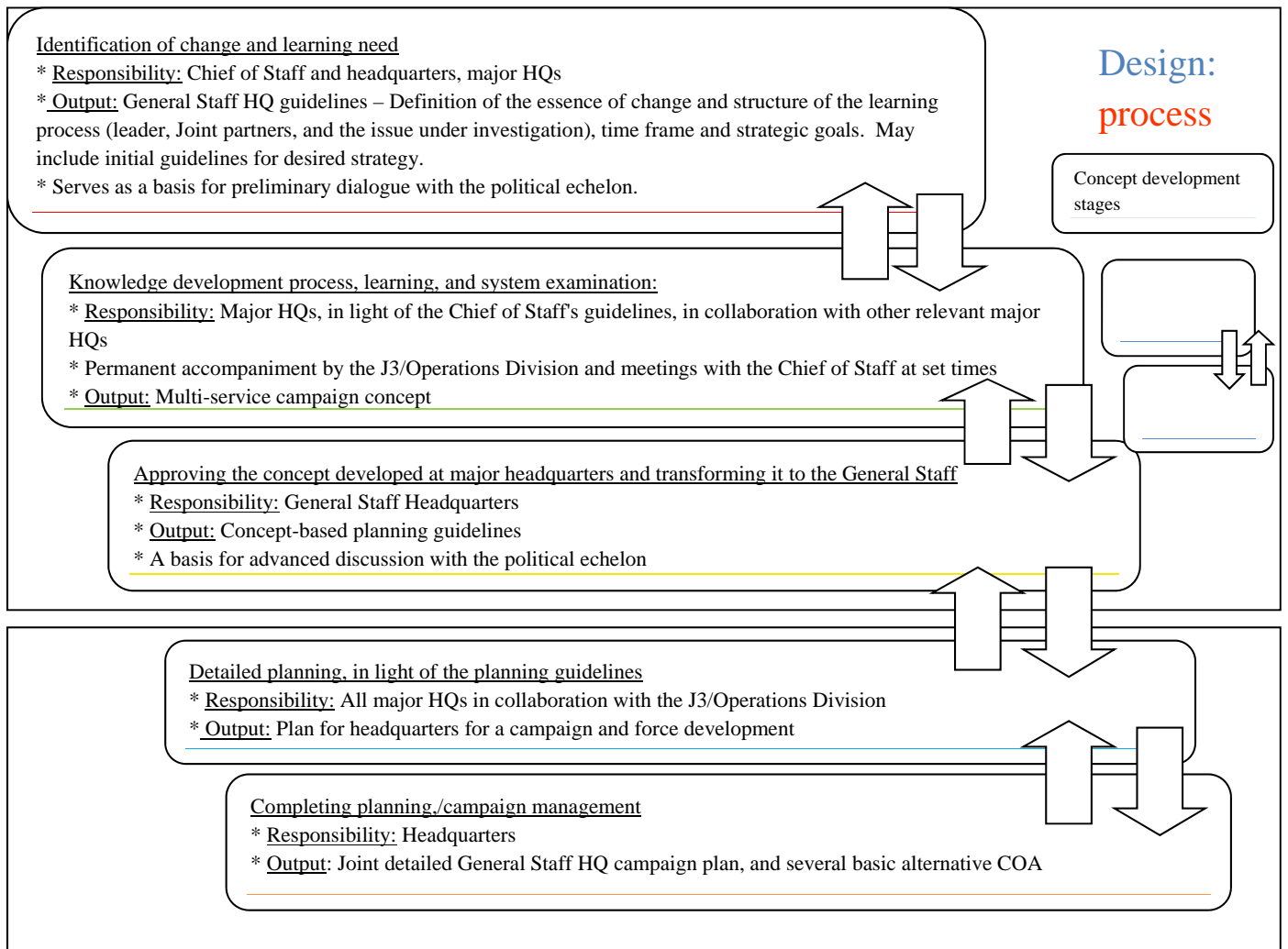
<sup>5</sup> Strategic framework – preliminary strategic understandings that their essence is an understanding of the strategic system (its trends, players, the relationships between them), and the appropriate achievements within it (what are the threats, the opportunities hence the worthy and attainable targets that are appropriate to strive for).

<sup>6</sup> In the IDF there is a customary doctrinal distinction between the concept of employment of force (operational concept) and the concept for its design (“basic concept”). A process of knowledge development and learning for the purpose of forming a concept may be directed at a context far into the future, and as such mainly directed to serve the force design (meaning – to develop “a basic concept”).

## 1.5 General Staff Headquarters learning system

Diagram 1 shows the entire General Staff Headquarters learning system (entities, processes and outcomes).

### General Staff Headquarters learning system



- A. According to the diagram of the General Staff HQ learning system, the process is built upon the **various points of view of the General Staff HQ and the major HQs**, in order to create conditions for effective learning. According to this approach –
- 1) The General Staff, as the highest command echelon **that interfaces with the political echelon and one that is briefed** on all the campaigns managed by the state, **maintains a comparative advantage in the quick identification of changes emerging in the**

international and regional arenas and in the relationships and influences between various campaigns and arenas. Close proximity to the political echelon also gives the General Staff HQ a certain advantage in identifying changes in the political echelon's intentions and the interests of the state.

- 2) **The major HQs have comparative advantages in two areas: The identification of changes occurring in their arenas, or in their professional fields (emerging technologies of aerial warfare for example, or the formation of an enemy in the Northern arena); and the increased ability, as operators and direct designers of the force, to deepen the relationship between operational challenges and strategic intentions.**
- B. Based on these understandings, the General Staff Headquarters learning system is based on the idea that the **General Staff HQ is the central body responsible for defining the learning need, and outlining its initial strategic directions.** The major HQs are also required to point out relevant changes in their areas of responsibility and establish a learning process. At the same time, the General Staff Headquarters is the one that is able to understand at the outset the broad context of those changes and establish a learning process that at its foundation is an understanding of the inter-arena and inter-service relationships. Therefore, **the responsibility of the General Staff Headquarters is to define the desired preliminary strategic framework (it will be subjected to a critical analysis later), to define the leader and partners committed to the process, and to take part in the process.**
  - C. **The major HQs, each according to its responsibility, are entrusted with leading the learning process,** clarifying the preliminary strategic framework and developing the final product, a complete concept containing a coherent strategy backed up by a feasible campaign concept.
  - D. **In order to create a productive tension between the General Staff Headquarters and major HQs around subject of the design,** a preliminary structuring process is required (detailed later), to define the areas the major HQ will deal with (according to the aforementioned comparative advantages), and the areas the General Staff Headquarters will deal with (according to the aforementioned comparative advantages).
  - E. **Synchronizing the process (major HQ – General Staff Headquarters – political echelon) is of great importance for the purpose of productive feedback at the right time.**
  - F. **The concept** developed by the major HQ, as initially directed by the General Staff, will later turn into the General Staff concept that will guide the plans for the employment of force and / or its design. Of course this concept will be subjected to a critical examination and new adjustments later on, and will go through the cycle again.



## 1.6 How is Design done (in brief)?

Within the Design process the following components should be considered:

- A. **Structuring the learning process**<sup>7</sup> – The strategic context is unique, therefore the learning challenges of each process are also unique. In light of this, the first challenge is the design of the learning process, its stages, its partners, the reference materials we will use, etc.
- B. **Defining the relevance gap**<sup>8</sup> (offset, or parallax<sup>9</sup>) – At the foundation of every design process is the assumption that our current concept is not adequately suited for the emerging challenge.<sup>10</sup> Therefore, for every knowledge design process, a critical investigation is required of the gap created between assumptions, beliefs, practices, structure and our organization, and the change in the environment. Defining our relevance gap will facilitate further questions, which include the question – What are the (potential) opportunities that will enable a more relevant strategy and campaign concept?
- C. **Preliminary strategic framework** – After clarification of the relevance gap, general principles for a strategy - or several alternatives for strategy - can be drafted, which will better serve the interests of the State of Israel.
- D. **Critically challenging and establishing formative strategy** – The preliminary strategy has to be tested and challenged in several contexts: What will cause its failure? What are the inherent risks? Who within the system will object to it, and why? Can it be implemented? What are the obstacles for its implementation?  
 This challenge component is geared toward not only refuting unrealistic strategies, but also, and mainly, toward assisting with the improvement and development of the strategy on its conceptual and practical levels. That also makes this stage an appropriate transitional stage for constructing a campaign concept. At the conclusion of this stage, a formative strategy will be shaped that will lead the continuation of the process.
- E. **Development of campaign logic and form** – Concept formation relies on the question of what will enable implementation of the strategy in the context of conceptual efforts (holding defense at the border, influence in the enemy's rear) the organizational formations that will implement them (territorial division, special operational command

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<sup>7</sup> Structuring –Structuring is the practice of designing and building of learning procedures, at their inception and during their management. This is the thinking about thinking process.

<sup>8</sup> **Relevance gap / offset**– this is the gap that expands between the change in the environment and the way in

<sup>9</sup> Parallax is a term often used in astronomy, that describes the difference in the apparent position of an object viewed along different lines of sight. That is, one's perception of the position of an object changes once one's own position changes. So too in design – we must change our own understandings and assumptions in order to perceive the gap between reality and own current concept.

<sup>10</sup> If this is not the case, the knowledge development process will be simple and enable a quick transition into the situation assessment stage.

for covert efforts in the enemy rear)types of warfare that will actualize the idea (deep raids, advance collection) and the principal changes in the existing force that will be needed in order to implement this concept. The campaign concept is supposed to facilitate the continuation of detailed planning (and it in turn will bring up challenges that will require concept adjustments).

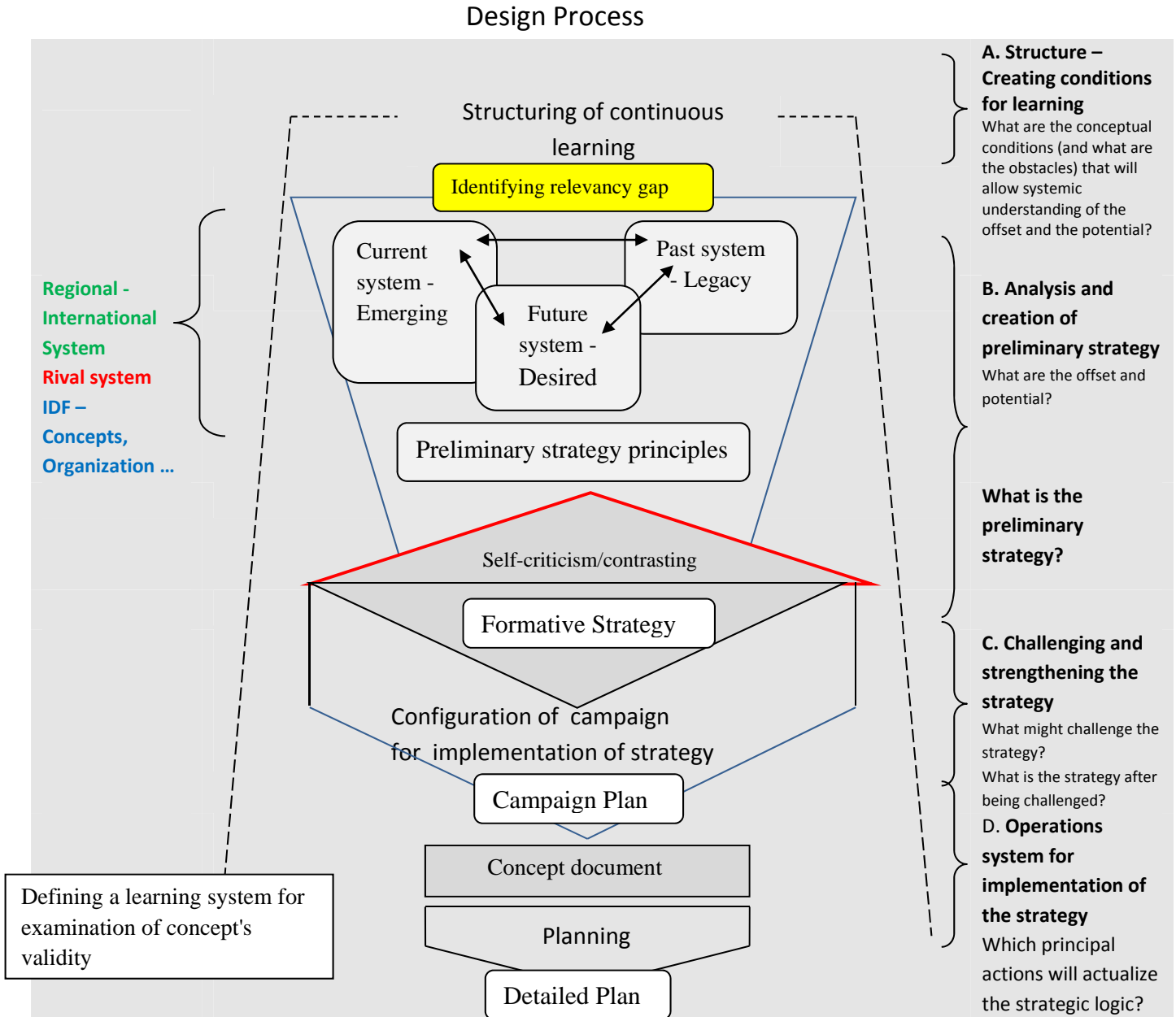
- F. After the formulation of the concept and the transition to the planning stage-establishing a dedicated learning system for the purpose of examining the validity and relevance of the concept that was developed.

## General Principles for Implementation of the Design Process

1. **Methodical** – The process has to be logically structured and have internal consistency, while the principles constitute a common language for all who deal with thinking and planning in the General Staff Headquarters and the major HQs. The principles and the process will enable the training of the commanders and staff officers for their roles as knowledge developers and planners, and provide the possibility of ongoing examination and improvement processes.
2. **Leadership by a commander** – The main outcome of the knowledge development process is the shared understanding of the team and the concept that will be formulated and serve as a foundation for future operations. It is vital that the commander lead the knowledge development process and formulate together with his headquarters and the senior commanders the shared understanding that leads to action and to addressing a problem through a particular concept. This common understanding is the key to formalizing a strategy and a campaign concept that are consistent and unified, as well to facing unexpected developments that form during the campaign. It is worth emphasizing that the concept developed in the process is considered an asset that belongs to the entire organization, even if the commander who led the process was replaced.
3. **Documentation that will enable revisiting previous stages as needed** – There is great importance in documenting the learning process, both what is stated orally and the summarized conclusions. Documentation allows a relatively comfortable return to earlier stages, in order to implement the principle of continuous critical examination of our previous assumptions; insights gained later in the process may take us back to change our initial insights.
4. **Collaboration and diverse points of view in the learning process** – By nature, a systemic learning process of complex and complicated systems requires the integration of various points of view, different disciplines, etc. In addition, the learning process not only produces knowledge but also has a central role in building the team (commanders, headquarters, and external organizations) that will implement the emerging concept. Because of the relative complexity of the type of knowledge in question, it is preferable that the basic learning group be established as early in the process as possible.

## Design Process Stages

Diagram 2: The principal stages in the design process



### 3.1 Three central terms in creating the conditions for critical thinking

- A. **Context** – This is a unique situation in time and space, in light of which we carry out the learning process in order to formalize the strategy and campaign concept. **For example** - The context of Operation Protective Edge was fundamentally different from that of Operation Pillar of Defense as far as the geopolitical context is concerned. During the first, Mohamed Morsi, a Muslim Brotherhood member and supporter of Hamas, was the leader of Egypt while during the second, Abdelfattah El Sisi, who views Hamas as his enemy, was Egypt's president.
- B. **Relevance gap (offset)** – The subjective meaning assigned by the knowledge developer to the relevance gap, which (possibly) was opened between our current concept (or parts of it, its fundamental assumptions etc.) and between its validity in relation to the new situation. **For example** – Once, the term "strategic intelligence alert" was sufficient to arrange the operations of most of the IDF intelligence forces. The threat of conventional armies allowed the definition of indicators of war and in light of those, collection efforts and a suitable intelligence force design. The transition from conventional threats (demanding preparation for war) to a threat of hybrid organizations with short-range rockets (which are concealed by nature and generally ready at all times) demands a change in the intelligence tasks, collection methods and the manner of its force design. The relevance gap should be clarified and examined through a historical placement of our concepts' sources at the time, and what has changed in the environment since we formed the principles of our concept ("genealogy").
- C. **Opportunities and risks (potential)** – The potential is the totality of the positive and negative possibilities embedded in the currently emerging system and upon which it would be prudent to act in order to influence them in our favor for the creation of the desirable future system. The potential can come in a variety of aspects – enemy vulnerabilities, emerging technological capabilities, potential international treaties, etc. The potential can also be positive – one whose exploitation/development will advance us toward the desired future situation, as well as negative – one that can act against reaching the desirable situation. **For example** – In 1955-56 the state of Israel recognized the negative potential - the risk - in [Abdel] Nasser' joining the Soviet Bloc and his planned military build-up (the Czech arms deal). Israel also identified the positive strategic potential in the threat Nasser had posed to the French by his support of the revolt against them in Algeria. Identifying this potential allowed the formation of a strategy, in which resulted in the campaign concept we know as Operation Kadesh (which included an Israeli-British-French coalition).

### 3.2 The discussion on alternatives in the Design process framework

- A. **As a general rule**, this development approach points toward the design of **one coherent systemic concept**, created out of the group's analysis.
- B. **At the political level there can be different approaches** for handling the challenge. It is preferable that the political directive/direction will be clear, but at times that is not the case. Therefore, the design process will include, among other things, the clarifications of these approaches and the tensions they impose.
- C. If the **General Staff Headquarters is interested in creating alternative strategies**, it has to establish additional teams that will conduct a separate learning process that, it is reasonable to assume, will produce alternative strategies.
- D. **The debate over various strategic approaches occurs naturally** within the process, during both the strategy development stages as well as the development of the campaign idea; but the knowledge structure created by the team **clarifies during the debate** over the strategy and the campaign concept stemming from the team's analysis. One has to aim at the development of a discussion on the various emerging approaches, since in the end this diversity enables a fusion of ideas. A common way to create a dialogue of the various approaches to strategy is by splitting the work into sub-teams.
- E. **The identification of strategic alternatives** will generally occur at the stage of analyzing the potential.
- F. **Alternatives can also arise during the operational implementation of the chosen strategy**, but in the end, the team will design the campaign concept for implementation, which best embodies the strategy that was developed.

### 3.3 Implementation of the Design process by stages

- A. **Stage A – Structuring of continuous learning** (structuring is a principle that is actualized throughout the process)

#### Structuring Continuous Learning



As stated, two principal understandings arise from the critical-systemic approach:

- 1) A diverse study-group, as well as diverse sources of references, are required, which will enable multiple points of view on the problem.

- 2) The above must be uniquely formulated to suit the unique learning challenge.
- 3) **The goal at this stage is:** To organize the structure and appropriate learning “strategy” for the unique emerging context.
- 4) For the purpose of the structuring, the following issues have to be addressed:
  - a) What are the critical observations, or what prompts the development of a comprehension that a gap has opened between what exists and what is desired? What in the current context brought about the need for the learning process?
  - b) What is similar and what is different between the current context and other contexts in the past? What similar past circumstances and events arise in relation to the unique context, and what can be learned from them about this context? (These questions will help in identifying potential reference materials for further study).
  - c) What, in the current context, influences the strategic problem being faced, in a manner that distinguishes it from similar strategic problems we confronted in the past? (These questions lead to awareness of the limitations in past learning).
- 5) – **Milestones of Stage A**
  - a) Designing the boundaries of the system we are about to investigate (as an initial diagnosis that will need later changes and discussion). The system "boundaries" are a conscious decision by the learning process leader, and they assist us in understanding what has changed and requires examining during the process.
  - b) Defining the vital entities/partners to the study group.
  - c) Survey of reference materials we require for an effective learning process (historical events, analogies from foreign militaries, etc.);
  - d) Clarification of the main methods to be used in the process (lectures, a series of war games or simulations, etc.)
  - e) Challenging common and accepted views – What are the viewpoints that will serve us? Are specific people holding unconventional opinions needed? Who are they?
  - f) Clarification of the learning challenge facing us and the potential barriers preventing us from understanding the reality systemically.
- 6) **Structuring is required for creating productive tension between the General Staff HQ and the major HQ.**
  - a) Defining the subjects of the learning as early as possible in the process is of great importance. Each echelon has its advantages and disadvantages in various disciplines.
  - b) In principle, the major HQ leading the process will focus on a concrete operational arena/challenge of which it is in charge. The General Staff Headquarters will handle its areas of expertise. For example, international aspects (regional or global), disciplines dealing with cyber, etc.

c) Initial structuring is required in order to establish such a schedule, which will allow both levels to develop knowledge in the defined disciplines and confront it in the various process stages.

7) **The outcome of this stage is the learning “strategy” and an initial concrete structure for the process.**

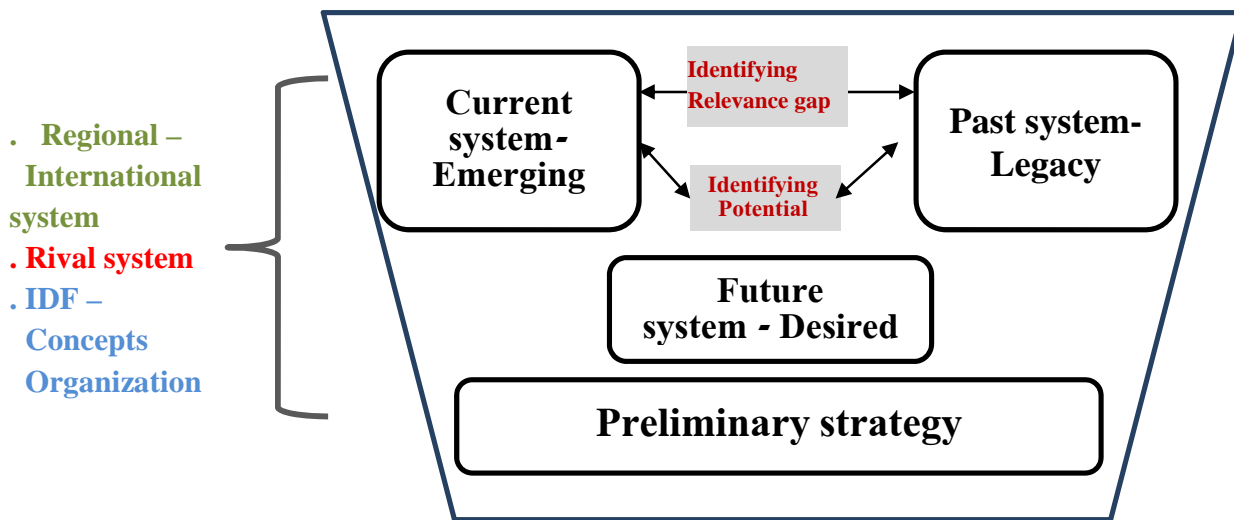
Structuring the learning is a necessary first step, which initializes the learning and lays the conditions for distinguishing between the existing concept and the alternative concept. It requires examination and updating all along, according to the development of the process.

B. **Stage B – Defining the strategic system (our interpretation of its boundaries and nature) and the development of an initial strategic concept.**

This is the stage where the study group creates for itself a basic orientation regarding the learning challenge and development of a strategy. The orientation is linked to three questions: What is the environment? What is our relationship to it? Where do we want to go? Therefore, at this stage the group will want to achieve the following goals:

- 1) A common interpretation of the strategic system – What is it, what are its boundaries, what defines the relationships between the actors, what threatens us? What constitutes an opportunity? What basic tensions define our relationship with the environment (for example, on one hand stability is desired, on the other hand we understand that if we do not act, the war will spill over into our borders.). To take a learning process about the ISIS threat as an example, we would ask - Where is ISIS aiming, what is its relationship with the Al Nusra Front, how do the regional countries relate to this all, the role and strength of the Iran-backed axis in the matter, and our position in relation to all of these issues.
- 2) To reach an understanding of the relevance gap and obstacles that made it difficult for us to act effectively in the environment up to this point (investigating the relevance gap [the offset] by way of examining the gap that developed between the logic of the legacy system and the reality of the emerging system).
- 3) To shape desired directions – What we would want to achieve (interests and targets) and the positive potentials that will enable us to strive for these goals.
- 4) Concluding the interpretation of the system (the current emerging system), identifying the offset (the relevance gap between the past original logic and the emerging one), and establishing the desirable / potential system (interests and goals desired to be obtained), the **definition of the problem and the framework of an initial strategy** are in effect reached.





5) The components required for analysis and discussion in the second stage of the process:<sup>11</sup>

a) **Analysis and initial definition of Israel's interests in the context the learning process is dealing with.**

For the most part, Israel's basic interests will be at the foundation of all issues before us to be studied, but specific interests relating to a given issue also exist, and they need to be discussed. Defining the interests is essential, as they act as the compass for the learning process. **The discussion of interests becomes much clearer after the stage in the learning process in which we identify and formulate the potential embedded in the desired future system.**

Once we have identified potential for a desired change in the system, the interests may change (for example, a traditional rival who can turn into a partner of sorts in the desired system). At times, the political echelon or the Chief of Staff will give concrete instructions in regards to interests (ie, what is featured in orders today under the title 'strategic purpose'). These too will be subject to critical examination relative to the identified potential.

b) **Description and analysis of the international and regional system.** In the initial delineation of the system, we must do an analysis of interests, main components and the relationships between them, as well as the tensions and the relations between components in the international and regional system expected to influence the developments. The approach of contemplation/reflection affects

<sup>11</sup> The analysis must combine reviewing the historical analysis of the relevance gap (offset) and forward looking observation allowing the discovery of opportunities in the system.

the system's boundaries; for example, the General Staff Headquarters may observe and analyze actors in a broader way than the command, since its responsibility is to observe, among others, broader and longer-term dimensions, including foreign relations and treaties, relations between campaign theaters, General Staff Headquarters resources, etc. In analyzing a command OPS arena, the analysis will indeed relate to broad trends if their significant influence is identified, but mostly will focus on regional relations, shared borders, etc. Analysis is performed from the military point of view and for its needs. The relevance of this issue is limited when dealing with learning and knowledge development in the disciplines of force buildup.

**Milestones at this stage:**

- i. Defining key elements in the international and regional environment that are relevant to the strategic issue in a unique context (such as countries and organizations). Clarifying the relations and tensions between them, and investigating their link to the problem, to Israel and the IDF and the rival system.
  - ii. Characterizing the trends in the international and regional environment and the relevance to the strategic issue in its unique context, and clarifying their connections to the problem, to us and to the rival system.
  - iii. Marking the elements and trends that can be influenced, through analysis of means to do so.
- c) **Conceptualization and analysis of the rival system (in relation to the strategic system under investigation)** – The emphasis here is on identifying the sources of strengths and weaknesses of the actors defined as enemies, or in other words physical, geographical, conceptual, human, political, logistical, etc. ‘centers of gravity,’ which would be possible to exploit in order to create the desired change in the system in favor of Israel’s interests (the broad fixed interests, and the specific interests according to context).

**Milestones at this stage:**

- i. Articulation of the logic (in the sense of system logic) on which the system before us is based, while analyzing the components and sub-systems of the rival system, and the relations, the links and tensions between them.
- ii. Defining the purpose / goals / objectives of the entire rival system, of each one of the sub-systems and each of the components.
- iii. Analysis of the systemic centers of gravity, strong points and weak points of the entire rival system, of each one of the sub-systems and each one of the components.

- d) **Analysis of the IDF – the concepts guiding our thinking and operations-** Concepts, plans, beliefs, organization and abilities related to the issue at hand. Our basic assumptions in relation to reality have to be identified. This is a self-critical task demanding a high level of self-awareness. The central methodology is researching the source of our logic, namely – examination of our organizational and conceptual **legacy** and how it developed. Going back in time to a place where our current logic was formed (genealogical examination) will enable the conscious definition of the gap created between the place our current concept was formed and the present circumstances.

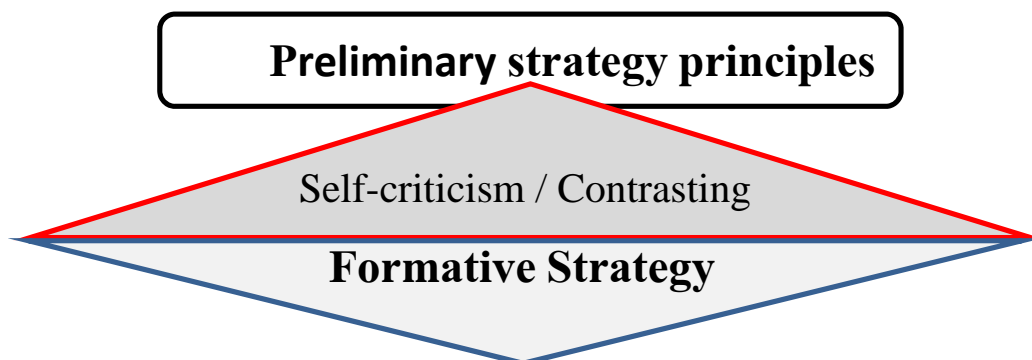
**Critical examination of the relevance gap (offset) should advance the following understandings:**

- i. Is the existing concept relevant to the current problem? If not, what is the source of the gap? What are our basic assumptions? Are they still relevant?
  - ii. Are there and what are the existing relevant plans for the existing problem? If not, what is the source of the gap?
  - iii. Does the existing organization offer a response to the issue at hand? What are the main constraints limiting the existing organization from functioning well in face of the current issue? (Mostly, this understanding will not bring about an organizational change, but changes to processes, command and control in face of the challenge etc.).
- 6) **Analyzing the elements of the system requires synthesis whose outcome will be a complete systemic understanding of the learning subject.**

**Milestones** to be crossed in an overall view of all the elements described above:

- a) Defining the updated Israeli 'interests' (in relation to the initial ones established at the beginning of the process) that the strategic concept has to address.
- b) Mapping the elements of the emerging strategic system, their interrelationships, the trends that characterize them and hidden variables.
- c) Defining the issue – How do we understand the essential challenge for which a strategy and a campaign concept are required?
- d) What changes in our thinking process will enable a reinterpretation of potential for change for the creation of an alternative strategy (if required)?
- e) Marking the optimal conditions that will enable moving from the current system to a desired future system (command structure, organizational structure, defining priorities, practices and performance).
- f) Formulating the principles of the preliminary strategic concept.
- g) As mentioned above, in the event that alternative strategies developed in the process, the discussion of those strategies is required at this stage.

C. **Stage C – Self-criticism/contrasting<sup>12</sup> to strengthen and validate the initial strategy.**



- 1) The self-criticism / contrasting occurs when we characterize the potential sources that threaten the strategy we built. These sources may be external (rival systems) or **internal** (sources objecting to a change in concept due to force design considerations, for example). By way of critical discussion of the sources of resistance, we have to attack the idea we built ourselves, while paying attention to organizational, cultural, international obstacles, etc., that may thwart the preliminary strategy. The purpose of this maneuver is to strengthen and validate the conceptual structure we created, and it actually mirrors the integration between the conceptual structure we created at the beginning and the understandings about the sources of resistance. At this stage an option also exists to challenge the concept we've created by way of a war game, red team or inter-echelon discussion.
- 2) **Goals at this stage**
  - a) Intentional creation of self-criticism to examine the validity of the initial strategy, through external (external elements that can thwart the strategy we've built) and internal (the internal elements that can thwart the strategy we've built) critical reviews.
  - b) Completion of the discussion about the tension between the positive potential and the negative potential of the strategy, and laying the conditions for their operational arrangement.

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<sup>12</sup>

Contrasting closely mirrors the idea of Red Teaming in terms of its purpose, with the important distinction that the contrasting is done by the Design team, and Red Teaming is done by individuals outside of the process.

- c) Documenting the elements that create resistance to the initial concept, which will constitute a portion of the control mechanism later on as well, for the purpose of examining the concept's relevancy (after its validation).

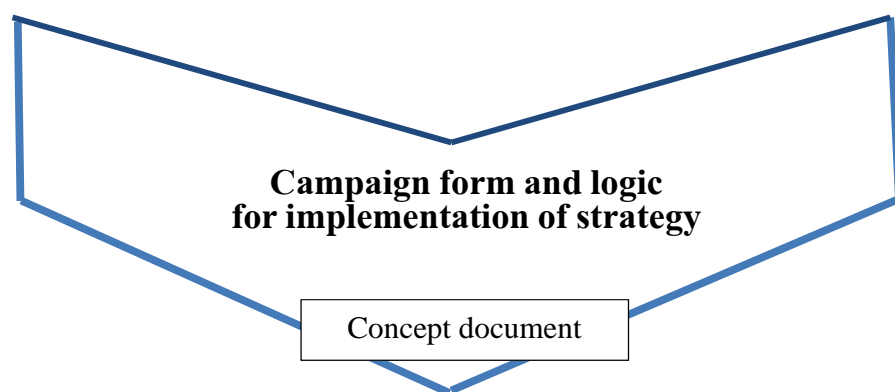
3) **Milestones at this stage**

- a) Mapping the possible sources of resistance in the context under examination; internal sources and external sources (elements, variables, trends and phenomena).
- b) Analysis of the way the insights from the self-criticism/contrasting stage were translated into a new definition of the strategic concept. (Is there a need for reframing of the issue?).
- c) Inquiry into elements we've identified that must be neutralized in order to maintain the relevance of the concept we've developed, and means of doing so.

4) **Stage outcome**

- a) Description of the anticipated risks for the initial strategic concept and ways to neutralize them.
- b) **At the conclusion of this stage the concept is validated:** After enhancing the initial conceptual framework through the review and contrasting stage, what remains is to summarize the concept in order to continue and establish the relevant form of operation – the systemic idea about the need for the use of force, or the basic idea for force design. At this stage strategy will be called "formative strategy."

D. **Stage D – Development of a fundamental action plan (campaign) for the implementation of the formative strategy.**



This stage deals with the manner in which military force will be employed in order to implement the strategic concept.

1) **Purpose of stage within the process**

- a) Formulating campaign principles for implementation of the strategic concept (time, space, resources, fighting techniques) and self-organization for an action allowing transition from current system to a future desired system.
- b) These principles will serve as the foundation for the coherent planning of operations.

**2) Milestones at this stage**

- a) Defining the main efforts that will be required during the campaign (Capture of terrain? Destruction by stand-off fires? etc.).
- b) Defining the principal approach to achieve these goals (maneuver or fire, nature of maneuver, attrition or maneuver, attrition or decisive operational decision, special ops or broad operations etc.).
- c) Marking the areas and dimensions in which the campaign will be conducted.
- d) Analysis of new patterns that must be developed (organizational structures, combat methods, etc.) which will allow us to implement the strategy we've developed.
- e) Defining the manner of structuring and organizing the development of the system of operations in time and space in a way that it will actualize the concept.
- f) Defining interfaces with parallel operational systems/entities that will enable the campaign to be conducted in the logic and form that we have defined.
- g) Defining command, operational and organizational mechanisms that will allow us to identify substantial changes in the logic of the emerging campaign. [For example, when the campaign reaches its culminating point].

**3) Outcome of stage**

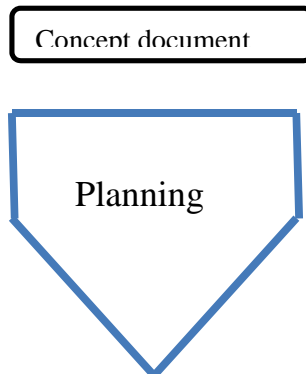
- a) Principles for a campaign of action in view of the strategic concept, which includes in principle the patterns of employment and organization of forces in the context of space and time.
- b) In the event that at this stage alternative ideas develop, this stage requires a discussion on them, and a decision.

### 3.4 Formal outcome of process – campaign concept

- A. The formal product of the design process is a conceptual document – a campaign concept for employment of force (namely, strategy and the way it is implemented). At its heart, as stated, sit the principles of the strategy itself and the fundamental form of action for its implementation – the campaign or a number of campaigns (the current campaign and plans for possible follow-up campaigns) – which includes the organization, command and control, and the like. In addition, for the purpose of critical review, the product should include documentation of the outcomes of the process as detailed previously -analysis of the international and regional environment, analysis of the rival system, analysis of IDF concepts and capabilities, etc., which served as the foundation for the concept.
- B. The concept document will be structured in principle in the following manner (within the context and boundaries defined in paragraph A):
  - 1) The boundaries of the operational challenge with which the concept is dealing (arena/enemy/...)
  - 2) Israel's interests / goals / objectives that the concept aims to achieve.
  - 3) Multi-dimensional systemic analysis of:
    - a) The international environment.
    - b) The adversaries.
    - c) The IDF, and Israel in general.
  - 4) The offset/parallax that developed and the identified potential.
  - 5) The formative strategy for implementation of the stated in paragraph A, in light of understanding the change and the desired potential.
  - 6) A systemic idea for implementing the strategy, specifically highlighting the fundamental assumptions at the base of the systemic idea.

### The link to the planning process

1. **From design to planning and from concept to a plan:** The General Staff Headquarters concept of a certain campaign or facing an operational problem, as formulated during the design process, will serve as the conceptual anchor and guide the **planning process**. For details of this interface see J3/ Doctrine and Instruction Division Instructions 1.11 – “Design and Planning in the General Staff Headquarters.”



2. In order to develop the optimal process of knowledge development and the optimal linkage between the body responsible for knowledge development (major HQ) and the General Staff Headquarters and the rest of the entities that will make use of the knowledge developed, the following processes are required:
  - A. Initial learning at the level of the General Staff Headquarters, constructing the learning and directing the continuation of the knowledge development process in the major HQ – **led by the Chief of Staff**.
  - B. Leading of the design process by the commander of the major HQ, in combination with the General Staff Headquarters elements and other major HQs that are relevant to the learning process, the creation of the concept and the implementation of the campaign.
 

Presentations to be performed and led by the Chief of Staff:

    - 1) Presentation of the offset and the potential analysis and the alternative strategies that emerged from it.
    - 2) Presentation of a detailed strategy.
  - C. Approval of the operational concept developed by the major HQ will be conducted by the Chief of Staff, then will be distributed as a binding General Staff Headquarters document.
  - D. Distribution of the General Staff HQ planning directive in light of the concept and implementation of the planning process until the General Staff HQ plan **are detailed in the instructions for planning**.
3. Duration of process – As always, relevant military knowledge development exists in tension with the existential requirement to be ready at all times. In this tension, between critical learning that strives for relevance and change, and optimum readiness in relation to existing knowledge, we must consciously define the correct target in terms of time for

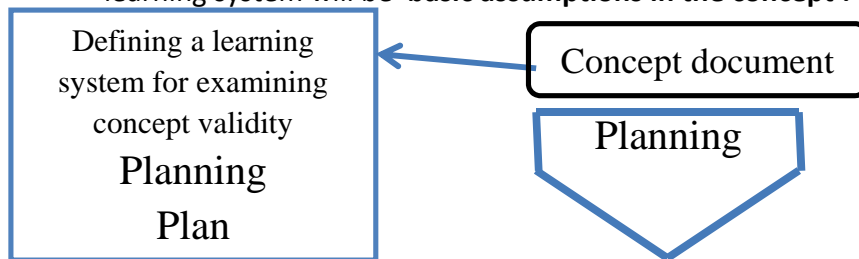


completing a learning process. This target has to be agreed upon by the General Staff Headquarters and the major HQ leading the learning process, and should not exceed several months.

### Ongoing evaluation of the current concept

The changing reality **will naturally challenge the concept that was developed**. This paragraph deals with the process required to evaluate the relevance of the current concept for the purpose of deciding on updating it or abandoning it and opening a new design process.

1. The commander is required **to define a dedicated learning system** that will examine whether the existing concept sits within a developing offset. The learning system is required to include dedicated research on the influence of changing conditions in the environment, suitable officials, dedicated presentations, and the like. A main tool in the learning system will be **'basic assumptions in the concept'**.



2. **Re-examination of basic assumptions** about reality ( the enemy, our forces, environment conditions, etc), upon which the concept was designed (and plans based on that concept), as far as their validity and currency, and the determination whether the present reality encapsulates a drastic shift or only a development. In actuality, this process examines whether an offset developed in our understanding of reality and whether our response is relevant to this reality. For this purpose, it is mandatory that the assumptions for all disciplines analyzed be documented (in parenthesis below are examples for purposes of illustration):

- A. The international environment (during an attack by organization X, country Y will not intervene militarily; the U.S.A. will permit emergency stationing, the Russians will not actively interfere in the arena.)
- B. Starting conditions of the campaign (initiated by our forces by surprise / initiated after a slow escalation, the number of fronts the IDF will fight in, warning time given...);
- C. The enemy (in a confrontation with Hamas, Hizballah will refrain from firing; the enemy will refrain from using biological and chemical weapons; etc)
- D. Our forces (the effectiveness of core abilities, there will be X time for training reserve forces, moving between theaters, etc.).
- E. Additional elements (percentage of population evacuating from the combat zone, United Nations conduct, etc.).

In order for the assumption to serve as a tool for understanding the change in the environment / situation, it has to be phrased as a refutable or verifiable sentence.

3. **A learning system for examination of a concept's validity must be presented together with the concept's approval by the General Staff Headquarters.**