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The US Army's defensive tactics and military adaptation during the Korean War, 1950–1951

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ABSTARCT

This study presents the organizational factors and processes that enabled the US Army's adaptation of its defensive tactics during the Korean War. This analysis initiates with a review of the literature concerning military innovation and adaptation, substantiating its rationale through the definitions articulated by Dima Adamsky and Kjell Inge Bjerga (2012). It assesses the adapted defense tactics from November 1950 to April 1951 and their integration into a revised edition of FM-100-5. Finally, it draws comparisons with analogous findings in current literature.

Introduction

The increased frequency of contemporary warfare within the context of revived competitions among great powers has stimulated scholarly inquiry about military changes during peace and war.¹ It is widely accepted that innovation during peacetime and adaptation during wartime are two types of military change that involve both significant and minor changes in missions, strategy, and tactics. Many military changes impact organizational procedures, but not all result in enhanced effectiveness.² Military innovation and adaptation are complementary processes; innovation entails envisioning future wars, yet it is susceptible to errors stemming from uncertainty and misjudgments. Consequently, adaptations are inevitably necessary when wars occur to align their anticipation with actual circumstances.³

Military adaptation is a bottom-up process, influenced mainly by troops deployed under evolving circumstances on the battlefield.⁴ A crucial factor is the inclination and autonomy of the deployed combat units to engage in novel warfare and exhibit receptiveness toward evaluation and critique.⁵ This implies the organization's capacity to execute reforms of frameworks, procedures, and cultural dynamics.⁶ Therefore, previous studies concurred that in-depth studies focusing on learning organizational processes are needed to pinpoint more precisely the requirements, players, and loops of military adaptation.⁷ What is the role of the upper echelons after the beginning of the adaptation process in the lower levels? If the process of military adaptation is

decentralized, how will the organization drive the learning processes? In a specific case, what are the stages of military adaptation?

This paper posits that the Korean War serves as a significant case study due to the notable disparity between its anticipation and the actual circumstances. This typically occurs on one side; however, the United States and China were compelled to respond shortly to an unexpected and unfavorable conflict. Moreover, the respective forces constituted fundamentally distinct organizations, possessed minimal understanding of one another and were necessitated to adapt or perish from the outset.

More specifically, the strategic reversal after January 1951 is among the most extraordinary deeds in US Army history. According to the literature, this shift occurred due to the leadership of the Eighth Army's new commander, Lieutenant-General Matthew Ridgway, who renewed the officers' and troops' morale.⁸ Rosen contends that Ridgway rebuilt the Eighth Army based on the most traditional doctrines, namely the proper use of terrain.⁹ Alternatively, Echevarria II stresses that, although the lack of equipment and the Korean landscape hampered the replication of the US Army's World War II doctrine, which was rooted in speed and maneuver, it proved air-ground cooperation was especially "effective against communist combat and combat support units."¹⁰ However, such explanations can be complemented to acknowledge the variation in the Eighth Army's performance grounded in adapted defensive tactics that imposed irrecoverable casualties upon Communist forces after January 1951, especially against its main offensives between April and May 1951.¹¹

The US Army's lessons from World War II (WWII) taught that defense maneuvers should be taken as pauses between offensive movements.¹² Conversely, the desperate experiences of the Korean War widened its perspective on new enemies in different kinds of war and theaters of operations.¹³ Lieutenant-General James Van Fleet, Ridgway's successor, acknowledged that "many of our officers who fought in World War II had never participated in a sustained defense or a retrograde movement and were inadequately trained in the tactics involved."¹⁴ Hence, after the disaster of the first encounters with the Chinese People's Voluntary Force (CPVF) in November-December of 1950, the US Army commanders, officers, and soldiers successfully adapted mobile defense and delaying actions to waste the enemy's forces without escalation. This was instrumental in providing time, focus, and confidence for decision-makers in Washington to revise the policy for Korea.¹⁵ Moreover, those tactics were issued into a doctrine that changed those left over from WWII. In 1954, the US Army issued a new *Field Service Regulations 100-5: Operations* that was thoroughly reviewed under the supervision of General Matthew Ridgway as Chief of Staff. It introduced new defensive concepts "to effect maximum attrition and disorganization of the enemy."¹⁶ Hereafter, defensive maneuvers stood equal to offensive movements as tactics available to "higher headquarters to pursue strategic objectives."¹⁷

The US Eighth Army's change in defensive tactics during the Korean War addresses some meaningful aspects of the contemporary debate because it allows the identification of clear patterns of organizational behavior that have led it to adapt with relative success. First, it underwent continuous adaptations, not as isolated and exceptional events, mainly due to the decentralized process initiated by infantry regiments, which was reinforced by the middle and upper echelons. Second, corps commanders had the task of catalyzing, synthesizing, and disseminating tactics, techniques, and procedures

to other subordinate units and the office of the Chief of Army Field Forces for distribution among schools and training centers in the United States. Finally, Matthew Ridgway and James Van Fleet were essential in overseeing and encouraging military adaptation against the most critical Chinese offensives.

This study presents the organizational factors and processes that enabled the US Army's adaptation of its defensive tactics during the Korean War. First, it navigates through the military innovation and adaptation literature and justifies its analysis based on the definition proposed by Dima Adamsky and Kjell Inge Bjerga.¹⁸ Second, it presents the US Army's doctrine on defensive maneuvers before the Korean War and how they failed in the first encounters with the CPVF. Third, it examines new and previously underappreciated documentation from the Korean War to delineate the defensive strategies employed by the 2nd Infantry Division and the 24th Infantry Division from November 1950 to April 1951, their dissemination within the US Eighth Army, and their insertion into the 1954 edition of FM-100-5. Finally, the paper highlights the organizational factors and processes that fostered the US Army's military adaptation in the Korean War in comparison with similar findings in other cases in the literature.

Military adaptation: The clash between imagined and actual wars

The current literature clearly differentiates between innovation and adaptation. Innovation involves the creation of novel ideas, methods, or technologies that enhance military capabilities and effectiveness.¹⁹ Adaptation is generally defined as a "change to strategy, force generation, and/or military plans and operations, undertaken in response to operational challenges and campaign pressures."²⁰ While innovation is a deliberate endeavor to discover new answers to future challenges, adaptation is a reaction to current ones.²¹

Military innovation frequently occurs in a top-down organizational loop. However, the practical application of these breakthroughs can be challenging. The outcome of innovation is determined by the characteristics of the innovation itself, the organizational context in which it is implemented, and the broader strategic and operational circumstances. Nonetheless, it is critical to recognize that innovation does not always result in positive combat performance. Military innovators should ensure that the additional benefits of a new capability are equal to or greater than the costs of abandoning existing ones. The precise balance of establishing and ceasing capabilities remains uncertain, making innovation a risk assessment and mitigation process.²²

Conversely, military adaptation is a bottom-up process, influenced mainly by troops deployed on the battlefield. The efficacy of adaptation hinges upon the capacity to get desired results, such as enhanced operational efficacy and fewer casualties. Nevertheless, assessing it can pose significant challenges due to adversaries' potential to change and adapt their strategies and tactics. This can undermine initial successful operations, rendering them elusive and challenging to assess.²³

However, a clear distinction between military innovation and adaptation is necessary. Military adaptation can be as challenging, if not more so, than innovation. Professor Williamson Murray presents a critical viewpoint, arguing that the armed forces of the past century have predominantly paid the cost of adaptation by sacrificing lives and

materiel, rather than through intellectual engagement and agility.²⁴ Furthermore, the United States, some with its NATO allies, Israel, and Russia, among others, has consistently engaged in military operations over the past two decades. This complicates the accurate identification of the transition between peace and war, as multiple crises are concurrently addressed within the escalating competition among great powers and their alliances. Consequently, the differentiation between innovation and adaptation is becoming progressively blurred because of simultaneous pursuit. The ongoing war in Ukraine can be seen as the most recent manifestation of that problem.²⁵

Adamsky and Bjerga offer a definition of military innovation and adaptation that seems to resolve these contradictions and serve as a solid starting point.

One process is when military theoreticians imagine the future of warfare and outline new theories of victory. Such anticipation emerges in a deductive manner, and innovation evolves in the top-down mode. Anticipation is primarily a peacetime effort that involves a lot of imagination, systematic exploration, and a holistic grasp of war's current character. The second process is a bottom-up innovation, which is more inductive and reactive and is thus dubbed adaptation. Adaptation is primarily a wartime effort that builds on the insights produced by battleground friction and on the lessons learned from the best practices.²⁶

Adamsky and Bjerga point out that anticipation/innovation and adaptation are complementary processes. The former implies the activity of imagining future wars in the face of international and domestic panoramas and contexts, which is why it is prone to many errors, as it is a type of change under uncertainty that makes precise, complete, and predictive visions unlikely. Therefore, when wars break out or political imperatives demand military operations, there is an inevitable need for adaptations that bring the imagined war closer to the one at hand. This conceptualization posits that innovation and adaptation are interrelated components in the continuous activities for creating and updating fighting forces.²⁷

These qualifications highlight the relevance of studying the Korean War, as the United States and Chinese leadership's visions for the subsequent wars and their forces were utterly different from what they found in 1950. Previously, both underwent profound organizational reforms, reducing military personnel and structures left over from the last wars and prioritizing other agendas rather than clashing against each other in Korea. Although the Chinese expected to confront the United States in a direct or proxy war in the future, the only scenario for confrontation in the short term was over Taiwan. In the case of the United States, the escalating rivalry with the Soviet Union led to a review of war scenarios in the context of the Cold War. However, in Asia, the only relatively likely expectation was the defense of Japan. Therefore, the gaps between the anticipations of China and the United States when they clashed in Korea were enormous. As a result, the war between them is a rich case of inevitable military adaptations.²⁸ Moreover, the US Army's change in defensive tactics allows it to recognize clear patterns of organizational processes, requirements, and critical players for military adaptation.

The US Army's defensive doctrine before the Korean War

The US Army doctrine in the Korean War was guided by FM 100-5 (Field Manual Service Regulations - *Operations*) 1949, emphasizing decisive action through maneuver

and mass. While decisive action foregoes the ability to concentrate firepower on one's opponent, the manual points out that maneuvers do not produce decisive outcomes but allow for executing other central principles such as offense, the economy of forces, and surprise.²⁹ Correspondingly, the US Army's experience in Europe, which is a chapter devoted to the offensive, stands out.³⁰ Hence, the definition of defense in the FM-100-5 is a pause between attacks: a tactical necessity within an offensive strategic orientation.³¹ Thus, on the one hand, the manual points out that the defense must be conducted by selecting positions that must be defended at all costs to avoid losing the offense's momentum and gains. On the other hand, this chapter is somewhat brief and not very detailed. Other defensive operations that cannot be associated with pausing a strategic offensive but which are part of a strategic defensive are compiled in the chapter "Retrograde Movement."³²

The manual offers three main guidelines. First, commanders should prioritize terrain in artillery employment and impose natural obstacles on their opponents. For this same reason, the manual points out that using armored units at the front is not typical but is part of a reserve, cover force, or counterattack.³³ Second, units must be arranged in depth to exploit the advantages of the defense and make it possible to direct resistance efforts to strong fighting positions. The defense should utilize successive positions employing terrain, mines, traps, demolition, and field fortifications.³⁴ Third, the end of a defensive engagement should be a counterattack of two types: to recover a position or close a penetration. The use of counterattacks to waste enemy forces is not outlined in the FM 100-5, 1949 edition.³⁵ In keeping with these recommendations, the manual mentioned that night defensive operations have the advantage of using terrain and employing artillery. To do this, the commanders must employ aggressive patrols to identify the enemy's route of advance.

Delaying action and retrograde movements were the most altered concepts after the Korean War. In the 1949 edition, the former concept meant, as a principle, to gain time without fighting a decisive engagement by defensive action in a position or successive positions, but exceptionally by offensive action, in general, as a means of deception.³⁶ Notwithstanding, retrograde movements were taken merely to get away from the enemy.³⁷ In addition, there was a lack of procedures for an all-around defense plan when a defensive line, characteristic of mountainous terrain, was not possible in depth. The 1949 edition also failed to pinpoint the optimal arrangement and detailed coordination between weapons in mutual fire support, including armored units. That was already a deficiency in the Pacific campaigns against Japan but was overlooked by postwar study committees. In the context of the war against China, these lessons were again hard to learn, as the Korean terrain imposed dispersion. It was not until mid-February 1951 that the all-around entrenched position became standard from regimental units to company units. In addition, the US commanders had to learn the procedures to deploy adjacent units for mutual covering and fire support on the battlefield.³⁸

The 2nd Infantry Division and the adaptation of defense maneuvers

As the 2nd and 24th Infantry Divisions were among the US Army's first units to deploy in Korea, they had to adapt their tactics and doctrines to stand up to the

North Koreans and then the Chinese. The 2nd Infantry Division was one of the first to deploy from the US; it arrived in Korea on August 5th of 1950 and participated in the Naktong Bulge battles on the Pusan Perimeter. Although it was deployed to Sunchon on November 3rd to engage with the CPVF, its first real test against it occurred at the Battle of Kunu-ri between November 24 and 29, 1950.³⁹

The 2nd Infantry Division then prepared for the offensive to the Yalu River, with the 9th and 38th Infantry Regiments stationed along the Paegnyong River and the 23rd Infantry serving as a reserve. With no contact with the Chinese, it established a 15-mile frontal dispersed formation. As a result, the Chinese infiltrated the 2nd Infantry Division's lines as soon as the first pulse of their attack began on the night of the 25th, reaching the 23rd Infantry's positions at Chinaman's Hat. Even with the usual lull in Chinese attacks during the day, these infantry regiments were unable to coordinate with one another until the 26th, so when the 38th Infantry began to lose cohesion on the night of the 27th, there was no support from the other regiments, and the 19th Infantry retreated across the Chongchon River, widening the gap for envelopment of the 2nd Infantry Division's right flank. When Lt. General Walker ordered the retreat of the entire Eighth Army line on the 28th, it was up to the 23rd Infantry to implement delaying tactics. However, the withdrawal of the 2nd Infantry Division's infantry regiments *via* separate routes resulted in one of the war's major controversies when Colonel Freeman of the 23rd Infantry decided to take a route toward the west to avoid Chinese roadblocks, but without permission from his superiors and before its adjacent sister units were well protected in their rear. As a result, the 2nd Infantry Division suffered significant losses during its withdrawal, including 4,980 casualties, 237 officers, and 64 artillery pieces.⁴⁰ The losses were so severe that it took almost two months of reorganization to restore its combat effectiveness.

In December 1950, the 2nd Infantry Division comprised 10,269 troops, which represented slightly more than half of its authorized strength. The addition of the French Battalion (1,020 soldiers), the Dutch Detachment (630 soldiers), and an additional 1,000 South Korean soldiers served to offset this. Nonetheless, these additions failed to address, and may have exacerbated, the issue of restoring combat effectiveness. The 2nd Infantry Division implemented a rigorous training program to address deficiencies identified in Kunu-ri and to establish a unified combat team consisting of veterans and various replacements. All combat unit commanders were directed to utilize all available time for the training and indoctrination of combat soldiers, with a focus on night combat and firing discipline. The primary conclusion drawn from the first case was that the night retreat represented the highest cost action. Regimental commanders should maintain their positions, even in the event of unavoidable envelopment, until they can be breached during daylight hours. In the second case, alongside enhanced fire coordination among adjacent units, greater emphasis was placed on techniques designed to expose the Chinese, including alternate position preparation, deception through dummy forward positions, and the use of camouflage.⁴¹

The Chinese Fourth Offensive represented the initial evaluation of the 2nd Infantry Division's adapted defensive tactics following the setbacks experienced at the Battle of Kunu-ri.⁴² The Chinese sought to eliminate South Korean forces in Hoengseong and to infiltrate and encircle the flanks between the US X and IX Corps in the Chipyeong-ni region.⁴³ The 23rd Infantry Regiment was tasked with

maintaining that position starting February 3, 1951. Alongside its four infantry battalions, including the French battalion, it was augmented by one company of Rangers, one battery of anti-aircraft artillery, one battery of 105-mm shells, one battery of 155-mm artillery, one combat engineering company, and one medical rescue platoon.⁴⁴

Colonel Paul Freeman Jr., based on previous experiences, prepared the 23rd Infantry for a siege.⁴⁵ Since it was recognized that the Chinese were essentially an infantry force, it was essential to neutralize spaces against infiltration. Freeman organized eleven companies lined up side-by-side, covering 360 degrees, and kept Company B as a reserve along with the ranger platoon.⁴⁶ Between February 3 and 11, 1951, the valley around the village was transformed by bunkers, trenches, outposts, explosive booby traps, and an airstrip for connecting aircraft and receiving supplies by air. Extra ammunition depots were distributed around the perimeter, and wire communications were tripled. Checkpoints were established at dawn for eight days, located half a mile from the perimeter. At dusk, the posts were withdrawn and replaced by observer posts protected by mines, booby traps, and barbed wire. Patrols were sent daily beyond these positions.⁴⁷

On February 10, 1951, aerial observations and intelligence reports validated Freeman's anticipations, indicating that Chinese forces had encircled the 23rd Infantry. Ridgway expressed confidence in the 23rd Infantry's ability to maintain its positions while the 1st Cavalry Division deployed its 5th Regiment to alleviate the siege, leading to significant Chinese casualties.⁴⁸

The Battle of Chip'yong-ni was celebrated as the first significant victory over the CPVF and convinced the US commanders that they could neutralize the Chinese numerical advantage in infantry.⁴⁹ On February 16, 1951, when the lessons learned were fresh, Ridgway held a conference where he stated that "he would like to see what we can learn as a lesson and what we can do immediately and long-range to improve the situation."⁵⁰ Consequently, rather than merely a heroic act, that battle served as a laboratory for adapting tactics that would be replicated in subsequent engagements and synthesized in the 1954 edition of FM 100-5. Three can be emphasized.

First, this battle highlighted encirclement as an operational resource. James Van Fleet pointed out that by comparing casualty data with each other, units that stood their ground and fought (as opposed to those that broke and ran) may have benefited from the advantage of staying in position until ordered to retreat.⁵¹ Hence, the encircled unit must maintain integrity, organize the defensive perimeter, and remain in position until a rescue or breakout is coordinated and supported by other forces.⁵² Indeed, this decision was not limited to the immediate commander; it would be justified only when the higher echelons assumed rescue was possible before defeat or an irreversible perimeter breach.⁵³

Second, the 23rd Infantry Regiment employed defensive positioning and articulation among units, which would be studied in US Army schools for years.⁵⁴ It was compact, with mutual supporting fire across the length of the position, with a considerable proportion of the firepower being forward deployed and reserves maintained from the start for the counterattack.⁵⁵ However, these reserves must be distributed rather than held in a central position, as it is more common to have them to reinforce several points at once.⁵⁶

Third, the 23rd Infantry Regiment performed as an island of resistance in which the bulk of the Eighth Army was conducting reconnaissance in force or held its reserves in a position to counter the Chinese forces.⁵⁷ Therefore, this battle represented the embryo of one of the most significant changes in defensive maneuvers of the FM 100-5, 1954 edition: mobile defense.

The mobile defense was absent in FM 100-5, the previous 1949 edition. Conversely, the new 1954 edition introduced that armored divisions would favorably conduct mobile defense, but may be accomplished by infantry when conditions permit. Its operation comprises three components:

1. Observation posts with the task of carrying out aggressive patrols. Their mission is to deceive the enemy, warn of an impending attack, canalize the enemy into less favorable terrain, and block or impede the advance of the attacking force. However, they do not always hold their initial position and may implement delaying actions where necessary.
2. An island of resistance “is an area organized with all-around defense to hold that terrain vital to the scheme of maneuvering the striking force,” usually composed of one infantry regiment.
3. A striking force to destroy enemy forces comprises the remaining units that are not necessary to garrison the defensive positions.⁵⁸

However, the 23rd Infantry Regiment in Chip'yong-ni represented a localized instance of success. The Eighth Army needed to implement additional adaptations in the subsequent weeks aimed at designing operations to counter the Spring Offensive, the apex of Chinese offensives in the war.

The 24th Infantry Division and the adaptation of retrograde movements

The 24th Infantry Division was based in Hawaii and participated in the Pacific War against Japan; it performed occupation duties there when it was ordered to deploy to Korea on June 30th, 1950. Like the rest of the Eighth Army, it followed a limited training and conditioning program.⁵⁹ That resulted in it having to undergo reconditioning while resisting North Korean columns.⁶⁰

Nonetheless, the 24th Infantry Division performed highly in defensive operations since its first clash with Chinese forces. The 5th Infantry Regiment established a bridgehead on the Anju River that was robust enough to repulse the CPVF vanguards on November 4, 1950, followed by counterattacks and reinforced patrols against roadblocks by the end of that month.⁶¹ It also played a significant role in countering the Second Chinese Offensive that started on November 26 by breaking through the Chinese roadblocks to envelop the US 25th Infantry Division at Suncheon. In this way, it kept the line of withdrawal open for the US I Corps and 23rd Infantry Regiment in Kunu-ri, again across the Anju River.⁶²

The performance of the 24th Infantry Division in retrograde movements was significantly inferior to that in positional defense. In January 1951, the CPVF executed its Third Offensive, penetrating the positions of the US 19th and 21st Infantry Regiments. The absence of plans for alternative retreats from one another and their

battalions necessitated improvisation. For instance, Colonel Stephens observed the infiltration of the 21st Infantry Regiment and opted to retreat, maintaining the 3rd Battalion in a reserve blocking position, yet refrained from taking any measures to halt the Chinese advance, even momentarily. He lacked confidence in both doctrinal orientations regarding the timing and procedures for employing his reserve during the retreat of the remainder of the regiment. The withdrawal plan originated from Ridgway, directing the 24th Infantry Division to retreat to the Wolf Line on January 2, 1951. This approach severed contact with the Chinese while avoiding casualties on their part. The significant shortfall of ordnance and vehicles between January 4th and 5th indicated a lack of preparedness.⁶³

Subsequently, the 24th Infantry Division subsequently began to implement an adapted retrograde movement, mirroring a plan established by the 21st Infantry Regiment, which included a clear delineation of retreat lines for its infantry, artillery, and tank battalions.⁶⁴ Ridgway made significant contributions by positively responding from the upper levels of the Eighth Army to previous adaptations implemented by infantry regiments and divisions. At the conference on March 13th, 1951, he emphasized to his corps commanders that planning for countering the Spring Offensive would be based on the concept of active defense, which should proactively combine mobile defense with counterattacks, while positional defense would be applied only in case of poor weather and intense Chinese pressure.⁶⁵ At his first meeting with his successor ahead of the Eighth Army the next day, Ridgway stressed to Van Fleet the topics to which he should give personal attention: “necessity for depth in defensive positions; planning for possible necessary withdrawals; [and] a rehabilitation of personnel and equipment by units’ reserves.”⁶⁶

The convergence of various efforts to enhance defensive tactics encouraged the 24th Infantry Division to conduct delaying actions with great performance against three Chinese armies in the Battle of Kapyong River.⁶⁷ The advantages of faster motorized transport and increased firepower were explored, resulting in significant exposure, fatigue, and casualties for the CPVF. Between the morning of April 23rd and the 28th, the following procedures were conducted: i) withdrawing its infantry regiments from 19 to 20 miles before nightfall, beyond the reach of Chinese forces, primarily under close air support; ii) establishing defensive perimeters, deploying observers and batteries, and formulating fire plans throughout the night; iii) engaging Chinese vanguards at dawn; and iv) utilizing concentrated air and artillery fire throughout the day while the main columns of Chinese divisions were engaged.⁶⁸

The CPVF rotated the 20th and 27th Armies in the vanguard to restore momentum. They were, however, grounded due to limitations in combat support services and the tactics employed by the 24th Infantry Division. The Chinese 20th Army failed to complete the envelopment on April 25 and 26, 1951, while the 27th Army resumed the attack on the following day, which was halted by the US 24th Infantry Division’s line of resistance supported by 700 US Air Force missions. Consequently, the Chinese 20th and 27th Armies were out of action, leaving only the 26th Army to fight, which had to overrun the other units to engage. This development allowed the 24th Infantry Division to recompose its order of battle and counterattack. It engaged against the 20th and 26th Armies throughout April 28 and another retreat on April 29. Finally, the Chinese armies were exhausted, could no longer recover the initiative, and held their positions.⁶⁹

The 24th Infantry Division mirrored the defensive countermeasures employed by the 2nd Infantry Division in response to Chinese nocturnal assaults: establishing a secure and extensive perimeter, ensuring coordinated fire among units, and maintaining reserves for potential counteroffensives. However, the optimal timing for retreats and counterattacks was modified upon observation that the Chinese altered their artillery fire pattern during their withdrawal, focusing it on the two ends of the front line to secure their withdrawal routes.⁷⁰ Moreover, Van Fleet did not fail in being instrumental by assuming Ridgway's command. He personally followed the battle from the IX Corps and the 24th Infantry Division's headquarters, "carefully watching the use of our superior firepower and extreme mobility at critical points."⁷¹

The 24th Infantry Division refined prior adaptations, which were rapidly shared and emulated with favorable outcomes by other Eighth Army units.⁷² This was stimulated by Van Fleet, who diligently and daily briefed his commanders to guarantee aggressive defense maneuvers to repulse the second phase of the Chinese Spring Offensive.⁷³ Finally, he enacted the preservation of those adaptations by an informative field study to be accessed afterwards.⁷⁴ According to Van Fleet:

By the spring of 1951, we had perfected our defensive tactics so that operations produced large numbers of enemy casualties. Our proficiency in retrograde movements improved, so we could execute consecutive orderly withdrawals for several days with excellent control and then take the offensive in a successful counterattack.⁷⁵

Until the Korean War, the retrograde movement was synonymous with retirement to gain time to sacrifice terrain or disengage from the enemy.⁷⁶ That was how decision-makers assumed it in Washington.⁷⁷ However, the performance demonstrated by the 24th Infantry Division at Kapyong River illustrated that retrograde movements could possess significant operational value. Consequently, the FM-100-5, 1954 edition, adopted retrograde movements as a delaying action in which the maximum punishment was inflicted on the enemy without becoming decisively involved in combat.⁷⁸

When conducted by infantry, it consists of successive defensive positions. These positions differed of position defense as follows: rear defense areas are not organized; forward defense areas are organized in less depth; the interval between forward defense areas is increased; emphasis is placed on positions that provide long-range observation and fields of fire. These differences permit infantry units to delay over increased frontages. The infantry tactics employed are those of the defense; however, the enemy is not normally allowed to close with the position. The defense on each position must force early deployment of the enemy. Armor, artillery, and infantry weapons are located well forward to inflict maximum delay on the enemy by engaging him at long ranges. A mobile reserve, supported by armor and artillery, must be prepared for rapid employment to meet enemy threats to any part of the delaying position.⁷⁹

The defensive tactics employed against the Chinese in the Korean War differed significantly from those learned in the European theater of WWII. While the FM 100-5, 1949 edition, guided the employment of ground forces in a war of movement and defense of a broad front, the 1954 edition of this manual radically changed the chapters "The Defensive" and "Retrograde Movements" with new concepts of operations that granted them substantial operational and strategic relevance. The 1954 edition conceived three types of defense – positional defense, mobile defense, and delaying

actions - that could be employed in conjunction “to effect maximum attrition and disorganization of the enemy.”⁸⁰

More remarkably, defensive and retrograde maneuvers stood equally to offensive movements as methods available to higher headquarters to pursue political and strategic objectives. The corresponding chapters were reformulated considerably with the new range of techniques, tactics, and procedures – such as all-around defense, defense in depth, islands of resistance, and coordinated barrier plan – and doubled in number of pages in relation to the 1949 edition.

Organizational requirements for military adaptation during the Korean War and beyond

The organizational patterns of the US Army in adapting defensive tactics during the Korean War align with other documented cases in the literature. Comparing them reveals three essential requirements: mechanisms for recording and evaluating combat performance, mid-level commands as vital organizational intermediaries for knowledge dissemination, and alignment between force commanders and government authority concerning war policy and military missions.

First, the operational environment is a crucial factor in military adaptation, as this necessitates a focus on the mobilization of available resources. The wartime context facilitates the establishment of widely accepted performance and effectiveness indicators, thereby enhancing the basis for analysis and recommendations for learning and change. This explains why the most successful military adaptation episodes have originated from the bottom up. As Hoffman points out, the existence of mechanisms for recording and evaluating the forces’ performance in the field was essential for the various adjustments required by the USAF during the Korean War, which used reports based on operational research and internal and external evaluation commissions.⁸¹ This is also evident in the US Army’s performance in developing defensive maneuvers during the Korean War. The divisional HQ that placed a more significant emphasis on their regimental after-action reports’ assessments and evaluation – for instance, the 2nd and 24th Infantry Divisions – had more noticeable changes in performance and learning, which served as a model for the rest.

The second requirement is that adaptations require mid-level organizational broker actors to oversee and enhance a list of the most promising and essential adaptations. Most cases originated from changes initiated by field forces; however, successful instances necessitated varying degrees of reinforcement responses. This is due to the fact that wartime adaptations unfold across multiple phases and scales of bottom-up diffusion. That is, beyond adjacent units in the field – which can be regiments, task forces, or battleships – the dissemination of learned lessons among units of different operational commands needs the involvement of an intermediary level of command to improve and amplify them.⁸² Otherwise, the organizational learning loops from the troops in the field to higher-level commands in the theater of operations or the homeland departments take too long.⁸³ Additionally, they are vulnerable to omissions or organizational balancing replies that consider other priorities.⁸⁴

More recently, a successful case was the UK Brigade Commanders in Afghanistan through 2-day post-operation symposiums, open to 400–500 people from government, civic society, and international organizations, representing a cross-section of brigade command levels.⁸⁵ Another example was the US Army corps commanders during the Korean War, who issued selected portions of command reports containing the more promising and demanding organizational, tactical, and technical improvements. Furthermore, the Eighth Army HQ in the Korean War consistently encouraged field studies on countermeasures to enemy tactics, which were repeated throughout the units.

Nonetheless, military organizations that lacked these crucial organizational broker actors were hesitant to make changes and were prone to a loose network with no discernible solution to be accepted. This happened, for example, with US Army convoys in Vietnam, owing to a decentralized structure that never developed an official tactical manual or standardized gun truck design.⁸⁶ In other circumstances, such as the Norwegian Army in Afghanistan, the coalition command structure hampered a mid-level player in its chain of command.⁸⁷

The most promising cases appear to have been those in which there was a level of correspondence or conformity between these facilitating players in the field of operations and centers of lessons learned and training in the homeland, as seen in the case of the Israel Defense Forces in Lebanon, the US Army Transport Units in the Iraq War, and the UK Army COIN doctrine in Afghanistan.⁸⁸ Particularly in the Israeli case, experimental units and knowledge officers were established to speed up the organizational loop for institutionalization of adaptations.

Nonetheless, a third factor is that even the most supportive organizational elements may prove inadequate if force commanders and government authorities do not endorse them or have conflicting views on policy and missions. This problem recurs frequently as political and military leaders alter their priorities and perspectives regarding future conflicts, leading to a devaluation of recent lessons learned and the institutionalization of effective measures. Thus, while complementary in force structure, adaptation and innovation can lead to differing organizational responses. Consequently, the changes and lessons are largely either undeveloped or promptly disregarded following the war.

These were the cases of the Bundeswehr in Afghanistan and the US Army after the Korean War. The Bundeswehr's deployed units in Afghanistan encountered difficulties in adapting their counterinsurgency doctrine due to disagreements among the Ministry of Defense, the Bundeswehr Command and Staff College, and the Joint Forces Operations Command regarding the prioritization of such capability for future operations and scenarios.⁸⁹

The US Army did not replicate the defensive tactics used in Korea in subsequent conflicts. The organizational changes, while prompting doctrinal and training revisions, were insufficiently profound. This may be attributed to the defense cutbacks and reorientations implemented during the Eisenhower administration in the 1950s, which resulted in a significant decline in the operational effectiveness and expertise gained during the Korean War.⁹⁰ This was a primary factor in Matthew Ridgway's conflicts as US Army Chief of Staff with President Eisenhower and Secretary Charles Wilson regarding the role of the US Army in postwar nuclear massive retaliation policy.⁹¹

Closing remarks

This paper presents the Korean War as a rich case for military adaptation studies. Adamsky and Bjerga's definition of anticipation in peacetime and adaptation in wartime are complementary processes in creating and updating fighting forces. Anticipation involves imagining future wars but is prone to uncertainty and mistakes. Therefore, when wars break out or political imperatives demand military operations, adaptations are necessary to bring the imagined war closer.⁹²

When summarizing the case of the US Army's new defensive tactics in the Korean War, two conclusions emerge in contribution to the contemporary debate. First, military adaptation is a set of relative and continuous processes that is the only instance of change because the enemy also adapts, and the refinement of tactics is a gradual evolution of tests and revisions on the battlefield. The US Army units reversed the drawbacks of the first clashes with the Chinese forces because they substantially adapted tactics and techniques between battles and operations. In contrast, CPVF units were unable to do the same. If we compare, for example, the US 2nd Infantry Division with the CPVF IX Army Group, the discrepancy in effectiveness gains between the former and the latter is striking. This comparison is helpful because these two units suffered the most significant setbacks and underwent the most prolonged periods of reconditioning between December 1950 and April 1951. However, the US 2nd Division underwent recurrent periods of reconditioning and training while adaptations were continuous. CPVF IX Army Group, on the other hand, had no preparation and training conditions for its participation in the Chinese Second Offensive. After victory under heavy casualties against the US X Corps, mainly the 1st Marine Division, it was only reintroduced in April 1951, without a period of training and rest between the pulses of the Chinese Spring Offensive. However, despite the gain in firepower during its rehabilitation, its effectiveness against the US X Corps was once again inferior. This was partly for environmental reasons: the terrain north of the 38th Parallel was less favorable than the North Korean northeast, and the UNF had better intelligence reports. Even so, the Chinese IX Army Group executed the same maneuvers against an opponent that had already adapted defensive maneuvers of positional and mobile defense with much greater firepower. Although these changes in the US Army had been progressive and evident since the Battle of Chip'yong-ni in February 1951, the IX Army Group was not encouraged to adapt its tactics accordingly. Consequently, when both units met again at the second pulse of the Chinese Spring Offensive, the 2nd Infantry Division performed much better positional defensive tactics, mobile defense and delaying actions that offset any Chinese advantage in surprise and numbers, also because they executed the same tactics as their first battles in November of 1950.

Secondly, military adaptation proceeds through a set of organizational loops that have as requirements: i) a mechanism to incentivize and register assessment, evaluation, and changes by lower echelons, which are the units more prone to observe effectiveness in the battlefield; ii) mid-level broker commands or branches with authority and reach to foster dissemination and learning throughout the organization; iii) minimum convergence about war policy and military missions so the field commanders are able to prioritize which adaptations are more demanding and promising for future operations.

In the Korean War, the US Army infantry regiments and specialized service battalions adapted tactics, techniques, and procedures stimulated by their direct and field commanders. Corps commanders performed a critical organizational role, by catalyzing and synthesizing the adaptations to other subordinate units and the office of the Chief of Army Field Forces for dissemination among schools and training centers in the United States. This occurred through regular documents such as 'Combat Notes' and close monitoring during rotations for reconditioning and training regiments and battalions. For their part, Matthew Ridgway and James Van Fleet played two essential roles. On the one hand, to prioritize the most necessary defensive maneuvers at certain moments of the war, and on the other hand, to oversee whether and how divisions and regiments were adopting or improving their employment. Letters of instruction and frequent conferences with corps commanders were the main instruments for the first function.⁹³ For the second, Ridgway and Van Fleet regularly visited divisions and regimental HQs between and during operations. Therefore, the US Army underwent continuous adaptations, not as isolated and exceptional events, mainly due to the decentralized processes initiated by infantry regiments and divisions, which were reinforced by the middle and upper echelons.

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