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Comparative Strategy in Professional Military Education

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ABSTRACT: This article addresses the lack of rigor associated with the application of comparative strategy in professional military education. It also offers an analytical approach to help students identify case-selection bias and thereby strengthen the value of case comparisons in the curriculum.

Instructors frequently use case studies to teach students to compare the strategies that different countries have used to respond to similar threats and challenges. Despite the popularity of using this approach to *comparative strategy* in professional military education (PME), there is no systematic effort to discuss its contours or establish guidelines for its use. This article discusses how best to use comparative strategy coherently, given its increasing use in PME.

The first and second sections of this article discuss the concept of comparative strategy with an emphasis on its potential value and the trends regarding its expanding use in an increasingly internationalized PME context. The third section identifies challenges in applying comparative strategy; while the fourth section offers suggestions for mitigating those challenges.

Concept

To establish a definition of comparative strategy, we can look at the way academic studies define comparisons. In political science the comparative method is understood "in terms of the rules and standards and procedures for identifying and explaining differences and similarities between cases often (but not always, defined in terms of countries), using concepts that are applicable in more than one case or country."[1] Also lacking a universal definition, strategy sometimes refers to a set of objectives or the management of resources to achieve a goal. The US Department of Defense, for instance, articulates strategy as a "prudent idea or set of ideas for employing the instruments of national power in a synchronized and integrated fashion to achieve theater, national, and/or multinational objectives."[2]

For purposes of this article, strategy is the coordination of all domestic and international activities—including the use of force—that civilian and military organizations execute to achieve national security goals. By extension, comparative strategy appreciates the differences and similarities of such orchestrations. The comparison should, at the very

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1 Sandra Halperin and Oliver Heath, *Political Research: Methods and Practical Skills*, 2nd ed. (Oxford: Oxford University Press, 2016), 202.

2 US Joint Chiefs of Staff (JCS), *Department of Defense Dictionary of Military and Associated Terms* (Washington, DC: JCS, June 2018), 219.

least, consider the geographical, historical, cultural, and institutional elements of the action to identify possible causes necessitating the activity. The primary purpose of the analysis is not to dismiss a general theory but to test it and refine it in distinct, national contexts. Comparing the implementation of new technologies in distinct national military organizations, for instance, could illuminate the mechanisms of innovation within the armed forces, the importance of doctrine, and the role national cultures played in shaping such processes.[3]

While this approach may provide generalized knowledge about a state's strategy, it may also downplay or ignore specific differences. Thus caution should be exercised before applying general theories. That said, a rigorous approach to comparative strategy should, by definition, yield scientifically useful results. Indeed, one political scientist recognized "it makes no sense to speak of a comparative politics in political science, since if it is a science, it goes without saying that it is comparative in its approach."[4]

Ideally, using comparative strategy should allow scholars to identify the limitations of a given strategic theory or to amend its conceptual framework. Comparative strategy is also vital as a trial-and-error method that might enable students to refine analytical tools or to develop new theories and hypotheses. The current lack of a rigorous methodological approach to comparative strategy, however, often allows students at PME institutions to compare case studies, or an "instance of a class of events," without appreciating the peculiarities of each case.[5]

Trends

The evolution of the use of comparative strategy can be understood as a consequence of the institutional, professional, and intellectual expansion of PME. During recent decades, national war colleges have gradually opened their enrollments to foreign participants from allied and partner nations. Annually, the US Army War College hosts approximately 80 foreign officers each year, the Royal College of Defence Studies invites students from 50 partner countries per year, and a third of the 200 students enrolled in the French War College hail from one of 60 partner nations.[6] Such institutions have internationalized not only their attendance but also their programs. The US Department of Defense now supervises five regional centers that provide partner

3 For examples, see Michael C. Horowitz, *The Diffusion of Military Power: Causes and Consequences for International Politics* (Princeton, NJ: Princeton University Press, 2010); Ariel E. Levite, Bruce W. Jentleson, and Larry Berman, eds., *Foreign Military Intervention: The Dynamics of Protracted Conflict* (New York: Columbia University Press, 1992); Paul K. Huth, *Extended Deterrence and the Prevention of War* (New Haven, CT: Yale University Press, 1988); Barry Posen, *The Sources of Military Doctrine: France, Britain, and Germany between the World Wars* (Ithaca, NY: Cornell University Press, 1984); and Jack L. Snyder, *The Ideology of the Offensive: Military Decision Making and the Disasters of 1914* (Ithaca, NY: Cornell University Press, 1984).

4 Gabriel A. Almond, "Political Theory and Political Science," *American Political Science Review* 60, no. 4 (December 1966): 878.

5 As used here, *class of events* is consistent with "a phenomenon of scientific interest, such as revolutions, types of governmental regimes, kinds of economic systems, or personality types that the investigator chooses to study with the aim of developing theory (or 'generic knowledge') regarding the causes of similarities or differences among instances (cases) of that class of events." Alexander L. George and Andrew Bennett, *Case Studies and Theory Development in the Social Sciences* (Cambridge, MA: MIT Press, 2005), 17–18.

6 "International Fellows Home," US Army War College, accessed January 22, 2018; "College Members," Defence Academy of the United Kingdom, accessed January 22, 2018; and "L'École," Ecole de Guerre, accessed January 22, 2018.

nations tailored instruction on such topics as security sector reform, civil-military relations, counterterrorism, and counterproliferation.[7] Other institutions specifically designed for an international military audience—such as the North Atlantic Treaty Organization (NATO) Defense College, the Baltic Defense College, the Inter-American Defense College, and the European Security and Defence College—have also changed the landscape of military education by putting comparative strategy at the center of the learning process.[8]

Hitherto, doctoral students in military history or international relations defended their dissertations within their home countries. With doctoral programs integrating students from around the world, faculties in both civilian and military institutions now come from many nations. Even the method of teaching strategy in today's war colleges reflects the internal "globalization" debate about rebalancing the discipline from a traditionally Western scope.[9] These trends create an environment that favors the international exchange and comparison of strategic ideas. This reciprocity, in turn, calls for the intellectual development of comparative strategy itself. In short, a comparative strategy approach matters because it not only expands students' cultural awareness but also allows them to challenge their basic assumptions about national security priorities and military policy and planning processes.

Challenges

Because war college students typically enroll after operational assignments, they are not often well-versed in the academic study of strategic context. International assignments may enhance cultural awareness, but they rarely supply an analytical framework for rigorously researching geographical, historical, cultural, and institutional variables. As a result, students often select case studies based on personal interest or proximity rather than clear relevance to a research question.

Thus, one of the primary challenges for using comparative strategy in PME is case selection. Absent rigor, two competing issues can undermine comparative strategy: studying only the peculiarities of cases and presenting the findings as universal rules. These factors preclude the discovery of useful generalizations and create a challenge between false uniqueness and false universalism.[10]

False uniqueness, a traditional bias, sees the country under study as so exceptional in its history, its culture, and its political system that

7 The George Marshall European Center for Security Studies, the Williams J. Perry Center for Hemispheric Defense Studies, the Daniel K. Inouye Asia-Pacific Center for Security Studies, the Africa Center for Strategic Studies, and the Near East South Asia Center for Strategic Studies. Larry Hanauer et al., *Evaluating the Impact of the Department of Defense Regional Centers for Security Studies* (Santa Monica, CA: RAND Corporation, 2014).

8 For more on other NATO efforts such as the European Security and Defence College, the 5+5 Defence College, or the ongoing project of the Gulf Cooperation Council Defence College, see Jean-Loup Samaan and Roman de Stefanis, *The Ties that Bind? A History of NATO's Academic Adventure with the Middle East*, Eisenhower Paper no. 1 (Rome: NATO Defense College, 2014).

9 Isabelle Duyvesteyn and James E. Worrall, "Global Strategic Studies: A Manifesto," *Journal of Strategic Studies* 40, no. 3 (2017): 347–57; Patrick Porter, *Military Orientalism: Eastern War through Western Eyes* (New York: Columbia University Press, 2009); and Pascal Vennesson, "Is Strategic Studies Narrow? Critical Security and the Misunderstood Scope of Strategy," *Journal of Strategic Studies* 40, no. 3 (2017): 358–91.

10 Richard Rose and W. J. M. Mackenzie, "Comparing Forms of Comparative Analysis," *Political Studies* 39, no. 3 (September 1991): 446–62.

any attempt to apply findings from studying it to other situations—or conversely to apply findings from other cases to it—are doomed to failure. This bias can be explained by the traditional skepticism of regional experts regarding the import of models and theories developed without in-depth understanding of their empirical fields. In military institutions, such bias can be derived from a national instinct—the inner belief in "the exceptional nature of *my* country's experience"—which is nurtured within servicemembers to build a cohesive identity and loyalty.

False universalism, which relates to the intellectual foundations of strategy in rational choice theory, may be a harder issue for national security practitioners to tackle. Furthermore, such universalism is very often Western universalism. The language of strategy matters here since the discipline of strategic studies may be global in terms of instructor and student backgrounds, but teaching and research are primarily in English. Therefore, students may arrive at universal generalizations derived from Western-centric material or biased comparisons, which too often serve to confirm preconceived notions.[11] The linguistic monopoly deriving from US primacy, in particular, carries preconceptions that cannot be ignored when comparing various national experiences.

The war college curricula of Persian Gulf countries that are allied with the United States, for example, tend to be influenced by the American PME model. But a well-established concept in the American strategic context, "national security," is translated into Arabic literally as *al-Amn al-Watani*. This translation does not consider US notions of nation and Arabic notions of *watan* differ greatly as both refer to very distinct experiences of political identity building and of state formation.[12] Likewise, American debates on the relevance of terms such as "homeland security" simply do not resonate in Arab or European contexts, which conflate the expression with "national security" or "domestic security." These linguistic subtleties are too often underestimated, if not ignored. But their misuse in other national contexts carries the same risk of false universalism.

With regard to nuclear weapons, strategists have also looked mostly, if not exclusively, at Western experiences. For a long time, scholarship on the topic was based on the nuclear postures between the United States and the Union of Soviet Socialist Republics (USSR), and it assumed the findings from these cases were generalizable.[13] As a result, concepts and theories of nuclear deterrence were developed in a specific context of two global powers involved in various regional conflicts. These principles were then applied incorrectly to very different contexts such as the regional powers of China, India, Pakistan, and, Israel whose security predicaments shared few commonalities with those of the United States or the USSR.[14] As researchers attempted to explain the causes for

11 Ken Booth, *Strategy and Ethnocentrism* (New York: Holmes & Meier, 1979).

12 For more on the modern development of the Arab state, see Ghassan Salamé, ed., *The Foundations of the Arab State,* Nation, State, and Integration in the Arab World, vol. 1 (London: Croom Helm, 1987).

13 See among others, Lawrence Freedman, *The Evolution of Nuclear Strategy,* 2nd ed. (London: Macmillan, 1989); Charles L. Glaser, *Analyzing Strategic Nuclear Policy* (Princeton, NJ: Princeton University Press, 1990); Thomas C. Schelling, *Arms and Influence* (New Haven: Yale University Press, 1966); and Raymond Aron, *Paix et guerre entre les nations* (Paris: Calmann Levy, 1962).

14 S. Paul Kapur, "India and Pakistan's Unstable Peace: Why Nuclear South Asia Is Not like Cold War Europe," *International Security* 30, no. 2 (Fall 2005): 127–52.

successive nuclear weapons programs, they paid scant attention to the specificities of the nuclear strategies; if they did, they frequently assumed views similar to Western ones.[15]

A proper comparative analysis can prevent us from inappropriately applying Western theories of nuclear deterrence to Asian countries and can offer alternative answers. Considering the limitations of past studies, recent assessments have used different models to reach a broader understanding of nuclear doctrine. Notably, these approaches factor in the availability of a reliable third-party security patron; the existence of a conventional, superior, and proximate threat; civil-military relations within the nuclear power; and resource constraints.[16] This framework still relies on general variables, but also aims to understand local dynamics. Pakistan's nuclear doctrine, for instance, favors asymmetric escalation. This characteristic exists not only because of the absence of a third-party ally but also because of the military's conventional inferiority and its primacy over civilian authorities for controlling its nuclear weapons.

Again, the selection of cases for comparison affects the reliability of results. Scholars and students generally have three options for conducting comparative strategy: analyzing many different countries (large-n study), comparing a small number of countries (small-n study), and examining a single country (case study or monograph). Larger comparisons tend to follow a quantitative approach that includes aggregating data on the national militaries under observation and comparing statistics. Smaller studies can include quantitative analysis but usually lean towards a more qualitative approach. Case studies and monographs typically examine a particular national experience deeply.

In PME, research trends toward qualitative comparisons of three to four different countries. A potential pitfall, students frequently act upon *case selection bias* by choosing cases for investigation intuitively before thinking rigorously.[17] Students in European war colleges, for example, often select cases from NATO members with the expectation that linguistic, geographical, cultural, or political similarities confer relevancy. These students likely find it difficult to conceive non-Allied cases may be more relevant for testing their initial hypotheses.

This pitfall may seem paradoxical, as students simultaneously assert the fundamental importance of these variables to understanding their own national experiences. Consequently, students may draw lessons from European militaries without considering important variables—for example, an assessment of German military strategy may not consider how the Second World War legacy and its implications on German civil-military relations constrain the international missions of the armed forces today. Similarly, some students may underestimate the significance of a variable such as financial constraint on European defense cases

15 Scott D. Sagan, "Why Do States Build Nuclear Weapons? Three Models in Search of the Bomb," *International Security* 21, no. 3 (Winter 1996/97): 54–86; and Jacques E. C. Hymans, *The Psychology of Nuclear Proliferation: Identity, Emotions, and Foreign Policy* (Cambridge: Cambridge University Press, 2006); and Kapur, "India and Pakistan's Unstable Peace."

16 Vipin Narang, *Nuclear Strategy in the Modern Era: Regional Powers and International Conflict* (Princeton, NJ: Princeton University Press, 2014), 32.

17 David Collier and James Mahoney, "Insights and Pitfalls: Selection Bias in Qualitative Research," *World Politics* 49, no. 1 (October 1996): 56–91

simply because their own military does not operate under the same budgetary pressures.

Other issues, such as the *benchmarking bias* or *leadership variable bias*, prevent students from fully exploiting comparative strategy because of deeply ingrained beliefs that cannot be easily dismissed in any adult learning environment. Students often compare cases using benchmark analyses rather than academic assessments. In other words, they select cases on whatever is considered—or what they believe is considered—to be a best practice. The students then assume their analysis will yield obvious lessons or recommendations for their own countries.

This logic yields inaccurate results. Even though their relevance is questionable, comparisons with the United States are commonplace in both European and Middle Eastern institutions. At the practical level, these studies are convenient because of the massive amount of scholarship produced on the US strategic experience and also, at times, because instructors are American. For the militaries of small states, comparing themselves with a major power can be a means of self-flattery, a statement of purpose in itself. But because this type of comparison is driven by expected outcomes—the best practices—it frequently excludes the national experience that led to the observed end state. Such comparisons may be shallow, especially if they ignore or downplay important variables that could caution against applying the results too broadly.

Beyond best practices, case studies elucidate the best or worst examples of leadership, a variable excessively emphasized within PME. According to this bias, strategy fails because of bad or shortsighted leadership, while successes result primarily from brilliant and innovative leadership. Sometimes, students attribute successes merely to one strategy or solely to the quality leadership of a commander. Not only do such articulations introduce problematic, monocausal explanations, but they also rely on retrospective illusion. Based on an outcome—the success or the failure—a leader or commander is deemed either brilliant or misguided from the start. But in some cases, leaders started poorly and adapted effectively. Conversely, leaders may have had a great plan that was not executed precisely at the operational level.

Thus as an explanatory variable, leadership remains problematic. The concept is not well-defined, and it is too often used by students as "magic card" to explain in hindsight the success or failure of one experience. Because the ultimate goal of PME is to educate and prepare future leaders in the field of national security, it is no surprise that students would see an individual as the central variable of national history. But too often leadership is an explanatory factor that blurs, rather than illuminates, the case study.

An additional factor, *omitted variable bias*, occurs when students fail to consider one or several explanatory factors in their comparisons.[18] When any comparison between armed forces is loosely designed, the study generates several flawed conclusions. Failing to distinguish between causation and correlation can lead to misidentifying the key variables of explanation and eventually to false results.

18 Jonathan Hopkin, "The Comparative Method," in *Theory and Methods in Political Science*, David Marsh and Gerry Stoker, 3rd ed. (Basingstoke, UK: Palgrave Macmillan, 2010), 299.

Aside from these challenges, the epistemological problems provide another counterargument for incorporating comparisons. Rational choice theory, which posits actors and systems will behave in universal patterns, so heavily influences the discipline that comparisons emphasizing local differences have been eliminated.[19] By focusing solely on a cost-benefit analysis, rational choice theory empties cases of human specificities and discards culture and tradition as a means of explaining the behaviors and decisions of policymakers. The limitations of this approach are well-documented in scholarship, however, its salience in PME institutions persists.

Suggestions

Comparisons in the field of strategy largely use qualitative, small-n studies. Thus the following guidelines are for that context. These guidelines provide tools to select more relevant cases and measure those cases' similarities and differences. These suggestions cannot address all the challenges for comparative strategy, but they can help achieve analytical inequality.

The first device involves clearly identifying the question driving the research project before comparing any feature or variable in a case. Once the question has been established, the comparatist can focus on the important purpose of comparative strategy: distinguishing between the particular properties of two or more cases and identifying the structural causes responsible for those differences. Ideally, these causes can then be applied in other contexts. The added value of comparing is not simply in the juxtaposition of two or more national military experiences, however. Comparative research can also explore key questions of strategy and provide new knowledge to the discipline, but only through careful case selection and effective differentiation of cases similarities and differences. Formulating a well-circumscribed inquiry before cases are chosen allows the researcher to probe a hypothesis and the comparative process to produce and to test new theories.

After clearly defining the objectives, students need to evaluate the relevance of potential case studies to the hypotheses. The main requirement for case selection should be analytical equivalence. One prerequisite that could be important to a case analysis is a geographical comparison, which would examine the effects of geography on the political and military structures of the compared states. Such a comparison should consider the implications of physical parameters on military resources, training, and basing. Obviously, a landlocked country such as Ethiopia would not allocate military resources in the same way that an island state such as Singapore would. Therefore a case study testing a hypothesis involving the contrasting characteristics would not produce relevant findings.

Geographical parameters also pertain to political and social considerations. Obviously, conflicts between neighboring countries—such as South and North Korea, India and Pakistan, or France and Germany (before 1945)—could be useful for a comparison of other

19 Lawrence Freedman, "The Limits of Rational Choice," in *Strategy: A History* (New York: Oxford University Press, 2013), 575–89; and Stephen Walt, "Rigor or Rigor Mortis? Rational Choice and Security Studies," *International Security* 23, no. 4 (Spring 1999): 5–48.

countries with similar tensions. The proximity of a regional hegemon also influences national strategies, such as balancing or bandwagoning. The United Arab Emirates (UAE) and Qatar, for example, built two very different foreign and defense policies vis-à-vis neighboring Saudi Arabia. Similarly, many members of the Association of Southeast Asian Nations (ASEAN) derive their strategies vis-à-vis China.

Comparative analysis must also consider historical legacies created by past experiences that shape a country's contemporary strategic orientation and play a significant role in its strategy. Too often, students explore contemporary issues without considering how historical events shape the way policymakers and military commanders assess current events and make decisions.[20] As Robert Jervis wrote, "Previous international events provide the statesman with a range of imaginable situations and allow him to detect patterns and causal links that can help him understand his world."[21] Leaders may be cognizant of a legacy or it can be a subconscious bias. France's skepticism of a NATO missile defense strategy vis-à-vis nuclear deterrence, for example, resonated with negative views held by France's political and military establishment regarding defensive strategies. Arguably, these views are shaped by the legacy of the Maginot Line that French armed forces implemented in the 1930s, which partly caused their defeat against Germany in 1940.[22] Similarly, Germany's military policy remains heavily-shaped by the memory of the Second World War. Today, the memory of Nazi war crimes hangs over German military policy, which imposes tight civilian control over the Bundeswehr and very strict mission scopes as observed in German operations with NATO in Afghanistan.[23]

Strategic culture also informs state trajectories. In Jack Snyder's seminal study of Soviet strategic behavior, the notion of *strategic culture* is defined as "the sum total of ideas, conditioned emotional responses, and patterns of habitual behavior that members of a national strategic community have acquired through instruction or imitation and share with each other."[24] This definition emphasizes the importance of cognitive processes in the ways actors come to perceive and frame phenomena in the international arena. Even when this cultural factor relates to geographical and historical legacies, it goes beyond them. It also refers to the way the social fabric of a country, its statecraft, and its national identity translate at the level of its military forces.[25] Discerning

20 Yuen Foong Khong, *Analogies at War: Korea, Munich, Dien Bien Phu, and the Vietnam Decisions of 1965* (Princeton, NJ: Princeton University Press, 1992).

21 Robert Jervis, *Perception and Misperception in International Politics* (Princeton, NJ: Princeton University Press, 2017), 217.

22 Posen, *Sources of Military Doctrine*; and Elizabeth Kier, "Culture and French Military Doctrine before World War II," in *The Culture of National Security: Norms and Identity in World Politics*, ed. Peter J. Katzenstein (New York: Columbia University Press, 1996), 186–215.

23 Stephen M. Saideman and David P. Auerswald, "Comparing Caveats: Understanding the Sources of National Restrictions upon NATO's Mission in Afghanistan," *International Studies Quarterly* 56, no. 1 (March 2012): 67–84.

24 Jack L. Snyder, *The Soviet Strategic Culture: Implications for Limited Nuclear Operations* (Santa Monica: RAND Corporation, 1977), 8.

25 Peter J. Katzenstein, *Cultural Norms and National Security: Police and Military in Postwar Japan* (Ithaca, NY: Cornell University Press, 1998); and Katzenstein, *Culture of National Security.*

strategic cultures may be challenging, but it enables us to better grasp the relationships between national narratives and military strategies.[26]

Strategic culture examines military organizations as a reflection of a nation being understood as an "imagined community."[27] Furthermore, this variable acknowledges external observers may perceive geographical, historical, or other factors of a given country very differently than its decision makers do. Israel's reliance on offensive doctrines and its occasional use of preemptive force, for example, can be understood by looking at the origins of the modern Israeli state and how the elements of its political identity—the combination of Zionism and a deep sense of permanent insecurity—have shaped its military culture.[28] Studying the experience of war in a country such as Israel can help future decision makers in US institutions to grasp the politics of security in Israel, the specific strategic culture it developed, and the choices it has made with regards to military doctrines. Likewise, officers can better apprehend the contemporary European military debate by comparing the legacy of the Second World War on countries such as Germany and France and then reflecting on their major differences.[29]

Lastly, comparative strategy should integrate the role of institutions in shaping national security policies. Students too often dismiss bureaucracies because of their mundane natures. But institutional arrangements matter, as they reveal the interaction between civilians and armed forces. These relationships inform us of not only the nature of the political system but also the operational implications of using armed force.[30] In this regard, recent comparative studies on nuclear strategies are valuable. Contemporary scholarship on cases regarding China, India, and Pakistan shows how assertive or delegative civilian control of forces affects nuclear posture.[31] The different nuclear strategies of India and Pakistan are the result of competition between civilian and military authorities in each country. Indian civilians are wary of political intervention by armed forces, therefore their government closely supervises nuclear policy. In Pakistan, however, the military enjoys direct control over the country's nuclear arsenal and largely

26 Alastair Iain Johnston, "Thinking about Strategic Culture," *International Security* 19, no. 4 (Spring 1995): 32–64; Colin S. Gray, "Strategic Culture as Context: The First Generation of Theory Strikes Back," *Review of International Studies* 25, no. 1 (January 1999): 49–69; and Jeffrey S. Lantis, "Strategic Culture and National Security Policy," *International Studies Review* 4, no. 3 (December 2002): 87–113.

27 Benedict Anderson, *Imagined Communities: Reflections on the Origin and Spread of Nationalism* (New York: Verso, 1983).

28 For more on Israel's strategic culture, see Michael Handel, "The Evolution of Israeli Strategy: The Psychology of Insecurity and the Quest for Absolute Security," in *The Making of Strategy: Rulers, States, and War*, eds. Williamson Murray, MacGregor Knox, and Alvin Bernstein (Cambridge: Cambridge University Press, 1994), 534–78; and Yoav Ben-Horin and Barry Posen, *Israel's Strategic Doctrine* (Santa Monica, CA: RAND Corporation, 1981).

29 Allison Abbe and Stanley M. Halpin, "The Cultural Imperative for Professional Military Education and Leader Development," *Parameters* 39, no. 4 (Winter 2009–10): 20–31.

30 For case studies on civil-military relations, see Zoltan Barany, *The Soldier and the Changing State: Building Democratic Armies in Africa, Asia, Europe, and the Americas* (Princeton, NJ: Princeton University Press, 2012); Caitlin Talmadge, *The Dictator's Army: Battlefield Effectiveness in Authoritarian Regimes* (Ithaca, NY: Cornell University Press, 2015); and Florence Gaub, *Military Integration after Civil Wars: Multiethnic Armies, Identity, and Post-Conflict Reconstruction* (London: Routledge, 2011).

31 Narang, *Nuclear Strategy*, 36; and Peter D. Feaver, "Command and Control in Emerging Nuclear States," *International Security* 17, no. 3 (Winter 1992–93): 160–87.

defines its doctrine.[32] In other words, institutional arrangements also play a significant role in shaping national strategies.

Systematic considerations of, and building upon, the foregoing parameters should prevent comparatists from succumbing to flawed results caused by omitted variable bias. Such an approach will enable researchers to not only emphasize the similarities and the differences between cases but also highlight underlying research questions—for example, why X uses its armed forces differently from Y in a similar situation despite similar past experiences.

As a practical example, consider a military strategy adopted by a small state in pursuit of its national security. Identify an underlying research question or hypothesis. A starting assumption might be that a small state has no choice but to either bandwagon with the local hegemon or balance power with an external ally. In this manner, case studies can help isolate variables influencing the state's preferred strategy. To test the hypothesis, "small state" must be defined, in particular geographic and political indicators should be established.[33] Obviously limited in scope, the following analysis applies the foregoing recommendations to a concrete case.

The UAE, Singapore, and Estonia share geographical similarities such as proximity to regional hegemons (Saudi Arabia and Iran, Malaysia and China, and Russia, respectively) and an overwhelming inferiority in terms of size, population, and resources. Historical and cultural considerations emphasize such peculiarities as the symbolic significance of Iranian control of UAE islands as well as the cultural ties between Saudi Arabia and the UAE, past Chinese and British presences in Singapore, and the Soviet occupation of Estonia.

In all three cases, research may suggest small states tend to mix bandwagoning and balancing rather than relying on one strategy. Balancing might be defined as relying both on security patronage from a major power, such as the US, and on developing indigenous defense forces. At the institutional level, this balancing may translate into very different situations. The defense of Estonia relies on NATO. Singapore and UAE defenses involve loose regional security architectures from the ASEAN and the Gulf Cooperation Council, respectively. The latter therefore favor more bilateral defense cooperation.

More profoundly, all three of these sample cases underline an element of the initial concept of strategy: how much the strategies of small states rely on external security from bilateral partnerships and multilateral alliances. Their inherent vulnerabilities deny them solely domestic sources of security. In this context, applying the framework of comparative analysis, which relies on selected cases that directly test the initial hypothesis, allows for better identification of the general lessons for small-state security. In any case, appropriate analytical guidelines should prevent researchers from oversimplifying the specificities of each case.

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32 Huma Rehman, "Nuclear Command and Control Systems: Pakistan and India," *CISS Insight* (June–July 2013): 27–36.

33 For more on small states security, see Giorgi Gvalia et al., "Thinking Outside the Bloc: Explaining the Foreign Policies of Small States," *Security Studies* 22, no. 1 (2013): 98–131; and Efraim Inbar and Gabriel Sheffer, eds., *The National Security of Small States in a Changing World* (London: Frank Cass, 1997).

Conclusion

Scholars and practitioners need a broader discussion of how to apply comparative strategy in the classroom. This article has raised some of the most significant challenges in PME institutions. It has tried to close a surprising gap in the existing literature on strategy, with regard to the uses—and misuses—of comparisons. Because of the quasi absence of past exchanges on the topic, much must yet be done. This article does not pretend to present a definitive account of what should be termed comparative strategy but rather to offer some recommendations on potential ways to mitigate or prevent unreliable results from its practice. Given the internationalization of professional military education, comparative strategy is likely to become one of its major research methods. Moreover, the globalization of PME institutions should not merely rely on Western-centric curricula and research materials. If we are to avoid such a phenomenon, more attention should be dedicated to building a comparative approach that finds a proper balance between in-depth analysis of similarities and differences in various armed forces and the search for more general knowledge for strategic studies.