IDF Special Units: Their Purpose and Operational Concept

Yoaz Hendel

The intense soul-searching in the IDF in light of the operational problems exposed in the Second Lebanon War has reinvigorated a process already underway for a few years as to the role of special units, both in routine times and in times of emergency.

The belated inclusion of special units in the Second Lebanon War, the operations in Baalbek and in Tyre that earned broad media coverage, and the high capabilities demonstrated in the twenty-four special operations that were not exposed in the media[1] highlighted the gap between the potential of the special units and their limited use during the war. A significant percentage of the quality manpower of these units in the regular forces and the reserves, the expensive equipment, and the combat skills acquired during many years of training were excluded from the combat in Lebanon due to a lack of operational plans for times of emergency and the small number of actual missions.

The purpose of this essay is to review the operational concept of the special units in the IDF, their assignments, and the possible alternatives for change, against the background of both the limited combat that Israel has faced in recent years and the challenges of conventional warfare that have once again become part of future scenarios.

What is a Special Unit?

In the IDF, as in any other regular military, there is a structural tension between the desire for quantitative power, which enables an easier victory on the battlefield, and the burden of a multi-dimensional entity.[2] The "large military" is not designed to deal with non-routine tasks or threats, and the principles of initiative, flexibility, and stratagems are not sufficiently expressed while dealing with an enemy that is outside the bounds of the recognizable "playing field." The role of the special units is to provide an operational solution to the military needs of the intersection of what is known and what has disappeared from the strict, traiditional military view. According to the IDF definition,[3] special units forces require varied combat training. They have a high level of basic combat skills, and since their assignment is the per-

Yoaz Hendel, Neubauer junior research associate at INSS

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formance of special operations, they are organized to operate in small units.

World War II was the final catalyst for the establishment of special units. The need for a force that would carry out special operations in which air, land, and sea capabilities were combined pushed Col. Hadley Clark, one of the assistants to the British military's chief of staff, to establish an independent force within the British armed forces. The success of the forces that were established on the basis of this idea injected new blood into the veins of the British military's attack capability – an ability that had been seriously damaged by the German advances in those years.[4]

In August 1953, Unit 101 was established in the IDF. Similar to the British special forces, Unit 101 operated with incursions, meaning the penetration of forces into enemy territory, the performance of a task, and the return of the forces to IDF bases. The unit operated until January 1954, but its unique character, its operational achievements, and the training of its personnel established norms and became part of the combat doctrine of the IDF.[5] When Unit 101 was created, the State of Israel had a naval commando unit that was composed of troops coming out of the navy (Palyam) and troops from the Palmach's Shahar division,[6] who served mostly in Military Intelligence. Nonetheless, the establishment of 101 was a watershed event from the point of view of the IDF's operational concept. The unit's activities succeeded in creating a significant cognitive effect among the enemy, and even more important, its soldiers succeeded in building a new ethos of the fighting Zionist, which appealed highly to the Israeli public.

From then until today, the IDF has managed to maintain the unique image of the special forces. Their secret activities, the tremendous curiosity they have aroused, and their aura of forces with unlimited abilities have often directly influenced the national mood (for instance, the boost in morale following the Entebbe affair, versus the "Lebanon effect," which intensified following the navy commando disaster in 1997), public opinion of the IDF, and motivation among the new recruits.[7]

Over time, the IDF cast three central units as leaders of the "specials": Shayetet ("flotilla") 13, the naval commando unit; the General Staff special reconnaissance unit, attached to military intelligence; and Shaldag, the air force commando unit. From a command standpoint the three units are subject to the branch headquarters (air, sea, intelligence), and not to an operational brigade. There are other select units in the IDF, both in reconnaissance roles under the command of the various brigades, and in specialty roles, such as the bomb unit of the engineering corps. The high quality of these units and the desire of the IDF's senior command echelons to use them in routine times as well have at times blurred the structural separation between them and the units the IDF defines as "special units." For this reason, particularly in recent years, the three leading special units perform tasks similar to those placed upon the top units in the territorial command system, and vice-versa. A specific example is the special task assigned to the Maglan unit (which is not included in the military definition of the special units) in the Second Lebanon War, the same task that was carried out by the Shaldag unit in Operation Grapes of Wrath ten years earlier.[8] Nonetheless, for special tasks that require a non-routine military solution, depart outside the command jurisdiction, or have the potential of systemic repercussions, the General Staff is careful to use the special units as the main force.[9]

Thus there are tasks whose nature determines the assignment to a particular unit, and there are tasks placed on a wide variety of elite units. Other than the fact that the label "special tasks" carries with it tremendous prestige, the special units also enjoy material benefits. The IDF invests tremendous resources in maintaining special abilities, far more than investments in other top units. Hence the covert struggle among the units over the right to enter the prestigious club of the special units and to earn a greater piece of the budget pie.

Despite the variety among challenges faced by the IDF special units, the similarities between the special units can be sketched along general lines:

- The tremendous resources, which translates into the ability to cull the highest quality manpower from the pool of new recruits, to invest time and money in training, and to maintain the unit with regular training activity over a more prolonged period than in other military units.
- The operational envelope.[10] The three units mentioned have long range transportation tools that enable them to move secretly to reach distant targets. They have special combat equipment that allows them combat fitness and survivability in the field over time; they also have a unique intelligence envelope that enables operational precision.
- These first two characteristics give rise to the special nature of the tasks placed upon these units and their position in the command hierarchy. The three special units are not directly subordinate to the ground forces command or the operational brigades, even though a significant portion of their activities is performed on land. Similar to all the top units of the army, they maintain a tight reciprocal relationship with the ground force and its tasks, but as opposed to them, they are not subordinate to this command authority.

The command assignment of the units for the most part prescribes their traditional mission, whereby the naval commando is tasked to attack harbors and ports; the Shaldag unit is tasked to provide assistance for air force missions; and the General Staff special reconnaissance unit carries out intelligence operations deep in enemy territory. Some of these missions are planned in advance to be carried out on the first night of a war, and some are intended to be carried out on a routine basis.

Over the years, the weight of the core roles has shifted due to intensive development of long range combat equipment (which constitutes a more efficient and less dangerous alternative for the forces), until the center of gravity of the special units leaned to the performance of complicated actions both in the various command areas and outside them during routine times. Another associated role that has developed since the 1980s is operation during terrorist attacks, which means maintaining tactical readiness for hostage attacks.

The Operational Concept

As per the army's definition, the special units are permanently subordinate "to the General Staff or the highest military headquarters or the war theater headquarters or a chief headquarters (such as the air force or navy headquarters), and during non-war times they are generally used at the initiative of the government and the minister of defense, or with their approval."[11] The multiplicity of subordinations that appears in the definition is not coincidental; the special units lack a permanent command and work for a number of "commander-managers." While a structural

assignment exists, the operational possibilities of the units do not match the ability of the organizations to which they are attached. The significance of this is that in many cases, from a professional standpoint, the corps that is in command over a special unit has difficulty serving as the overall authority, and thus requires external operational assistance from outside the said corps.

For example: an idea for an operation or attack by the naval commandos connected to a ground-based operation would presumably be approved at the naval command headquarters, which is almost completely composed of naval personnel, i.e., sailors by training. However, the ability of this staff to assess ground-based attack actions, the size of forces, equipment, and additional measures is limited, since it has little or no experience with these criteria. Therefore, approval of a plan for distant ground operations, even if it begins with naval activity, must involve additional professionals. Similarly, the air force headquarters would find it professionally difficult to supervise the ground-based actions of Shaldag, and Military Intelligence would be hard-pressed to assess operations by the General Staff special reconnaissance unit.

The summer of 2006 demonstrated once again the urgency of devising alternatives to the present organizational status of the special units.

For this reason, operation of special forces during wartime is concentrated at three central levels. At the first level the special forces are operated under corps or branch command with the intention of carrying out special operations. The purpose of these operations is to provide solutions to complicated problems facing regular forces (many times this difficulty derives from the mission's distance from Israel). These operations are undertaken under the purview of the General Staff, meaning outside the theater boundaries of the territorial commands, but the command subordination is to the responsible branch. Consider, for instance, the commando takeover of the Karine A ship. For the purpose of the example: the geographical theater boundary of the Southern Command passes through the Straits of Tiran, while the takeover plan was to have been conducted south of this boundary, so the geographic operational space for the mission was under the responsibility of the General Staff. In general, as in this operation, the General Staff is interested in having command input in such a sensitive operation, and therefore also takes part in the approvals process and even in the planning process. In wartime, however, an operation of this type could take place in the General Staff sphere without the General Staff being involved in it at all, since at that time command attention turns to the larger battle.

At the second level the special units are used in the "classic" manner for the purpose of carrying out special missions. These actions are undertaken in the General Staff sector with the approval of the General Staff and at its direction, and for the most part, the General Staff initiates/leads the process. An example is Operation Sharp and Smooth in Baalbek from the Second Lebanon War. In this operation, the General Staff special reconnaissance unit and the Shaldag unit were sent to an area outside the operational sphere of Northern Command. The initiative for the operation came from the General Staff echelons, which believed that such an action had the potential to positively affect the military and the Israeli public. At the time of the operation, a dispute developed regarding the appointment of a commander for the operation. The authority for the appointment was held by Chief of Staff Dan Halutz, who ultimately awarded it to the commander of the air force as a representative of the General Staff.[12]

At the third level, the special units are directly subordinate to the command spheres, either during wartime, but for the most part, during times of routine. For example: in the Northern Command, until the IDF's withdrawal from Lebanon, the special units were activated from time to time for "red line infiltration" missions, which is to say beyond the northern edge of the security zone. From a command standpoint, these operations were conducted by the territorial divisions; the relevant corps "loaned" the unit to the territorial command for the entire period of conducting the combat. Accordingly, the expenses of the action were divided evenly between the command and the relevant corps. Upon completion of the operation and its review, the units would return to the command subordination of the corps from which it came.

Since the beginning of the limited confrontation in Judea, Samaria, and the Gaza Strip, this temporary loan has become more routine. The special units (mainly naval commando and Shaldag) have been integrated quite frequently into targeted operations against terrorist organization. There is a shared interest in the integration: the special units want to maintain the operational tension and the high level of training, and mainly take part in the general effort, while the commands involved, mainly the territorial brigades, benefit from quality manpower, high abilities, and the creation of deterrence in daring operations deep into Palestinian territory.

This kind of joint work effected direct communication between the senior command echelons in the special units and the territorial division and brigade commands. During the Second Lebanon War as well, the forces of the three special units were operated in the Northern Command districts. The forces were made subject to the divisional commands, which operated them in the combat zones. These operations were certainly not considered special operations, but they were a dimension within the operation of the special forces in this war.

The success of the operations (mainly at times of limited confrontation) also caused the General Security Services (which acted in the field on an ongoing basis) to develop modes of communication with the relevant units, creating an operational triangle that reduced the roles of the appointed corps commands. Together with the broad actions in the limited combat and in "non-special" operations, the units continued to carry out targeted operations. Since special operations generally requires long term (many months) combat guidelines and a prolonged chain of approvals, the number of "traditional" operations was reduced while routine security operations became a central portion of the activities.

Rockets launchers, explosive charges, and stocks of ammunition seized by the IDF's naval commando unit in the Karine A takeover. The cargo was intended for the Palestinian Authority in Gaza.

The result was that the appointed corps continued to supervise the force buildup and maintenance while the territorial commands received the principal product. This phenomenon has not disappeared over the years, and attempts have been made to find a unifying factor that would handle the operation of the special forces. For this purpose, the Special Operations Control Headquarters was established in the General Staff. According to IDF definition, this headquarters is intended to be the General Staff body in charge of the ini-

tiation, undertaking, and control of special operations during emergency periods.[13] In practice, struggles for prestige and the reluctance among the forces commands to forfeit the prestigious units, the many resources, the quality manpower, and the accompanying media attention defused the idea. In 1997, the headquarters was combined with a special infantry division, and thus lost its main purpose.

The increased popularity of the idea of standoff firepower[14] has led to a change in the traditional thought processes in the IDF. The approach of the former chief of staff who heralded the operation of aerial and artillery force at the beginning of the Second Lebanon War was the strongest tangible expression of this. According to this concept of combat, decisive victory would be achieved via a cognitive effect while minimizing friction, meaning with a strike to the soft underbelly of the enemy in its deep defensive territory, but without including massive forces. The concept of standoff warfare includes air and artillery forces, and low signature ground forces.[15] The ground forces are required to be in the attack zones, to supply intelligence, and to assist in directing air and artillery forces. For this purpose, this force is meant to possess long range transport vehicles, and to have combat abilities and the training to survive in the field.

Operation Grapes of Wrath in April 1996 is a tangible example of the use that can be made of special units in a standoff fire campaign. At the time of the operation, most of the "large army" remained between the Blue Line (the border fence) and the Red Line (the boundary of the security zone), while the special units were scattered in the field and provided solutions for military needs. An additional role placed upon the special units in a distant campaign is operations with a cognitive effect. The effect of military sting operations in key areas in the enemy's home front often translates into greater damage than the destruction of large forces on the battlefield. The damage is not just physical, but mainly psychological.

The understanding that in future wars special units will have a central role prompted the General Staff to appoint (during the Second Lebanon War) an officer at the rank of brigadier general for the purpose of drafting optimal operating procedures.[16] After a long investigation it was also decided to revive the Special Operations Control Headquarters. The plan stipulates that the special forces remain within the rubric of the Special Operations Headquarters, and the special units are supposed to be added to it.

In practice, during the Second Lebanon War, the Special Operations Headquarters was a body empty of content, a headquarters without troops. It planned and initiated operations, and in certain cases even executed them with division troops, but the special units themselves were not integrated as was planned, but rather were operated as in routine times – waiting for the orders of the relevant command. However, the Northern Command, the said territorial command in the 2006 war, found it difficult attend properly to the special units. The core of the war was, from the command standpoint – and justifiably so – "the large military," the ground forces and the air force. The units initiated operations in conjunction with the corps headquarters and the General Staff along the lines of past wars, and even enlarged the "product output." At the same time, it seems that they didn't manage to achieve the requisite military sharpness in time of war.

Possible Operational Alternatives

Realizing force potential is a fundamental IDF principle of combat, and yet precisely the special units that according to all military principles were equipped to achieve high standard results failed to reach their potential during the war. The summer of 2006 demonstrated once again the urgency of devising alternatives to the present situation.

1 The first alternative is to draw on the experience of establishing a joint headquarters for all the forces. According to this method, a clear division would be made between force buildup, which will be left to the responsibility of the commands, and routine and wartime operation. Instead of the air force receiving instructions from the General Staff to assign Shaldag one operation or another, the air force would request of the joint command that the unit it oversees – Shaldag – carry out an operation. The joint command would be tasked with the matter of intelligence, professional guidance, combat materiel, training development, and developing plans for war time.

The benefits of this method are, first of all, improved ability. Until now, there is a built-in compartmentalization between the special units; despite convergence in many areas, the units are careful not to expose "too much" to the "rival" units. This is true in matters of combat materiel, lessons learned from operational activities, and operational information. The establishment of a joint command would put an end to this unnecessary practice and would enable reciprocal exchange while maintaining the uniqueness of the units (their particular roles). Another clear benefit is the multiplication of forces during war time – the number of troops in the regular and reserve special units is sufficient to carry out decision-related roles. Thus far the military has found it difficult to make such integrations during war time since it requires long term combat directives, training, and joint exercises. A joint command would enable routine joint preparations and joint operational activities during war time.

The primary drawback of this method regards the relations between the command appointed over the force buildup and the headquarters appointed for force operation. A joint command could harm the direct monitoring that exists between the designated corps/branches and the units themselves.

2 The second alternative is the American model, which is the establishment of a force of special units. According to this model, the joint command would supervise force buildup and operation. The supervisory com-

mand would be given the required tools, training bases, and envelope as per the special forces' areas of operation. For example, in the United States military the special forces command maintains a helicopter fleet of its own, which is responsible for training the troops and transporting them in time of need. It is reasonable to assume that this alternative will not be implemented in the IDF since it requires a significant structural change in the entire military. The benefits of this method, similar to the prior method, are mostly in improved abilities. Its main drawback is in the massive resources required for its implementation.

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The ostensible third alternative, leaving the situation as it is, is the simplest and easiest for the General Staff. Despite the command and control problem, the difficulty in reciprocal exchange, the lack of professional supervision, and the weakness in utilizing the force during war time, it is difficult to dispute the claim that "if it ain't broke, don't fix it." The special units have until now met the goals defined for them. No one expects them to decide battles; they operate at levels where silence is golden, and they assist in ongoing security. However, the special units also have a role that accompanies their operational occupation that from a certain point of view is no less important than their main assignment. From a public opinion point of view, they bear the flag, blazing the trail for the other military units. Their obligation is to show high norms of behavior, special abilities, and active participation in the national endeavor. When the entire military is mobilized for war and when reservists are sent onto the battlefield without materiel, as happened in the Second Lebanon War, it can be expected that the special units will recruit all of their people, and disperse the materiel and knowledge in the combat zones in order to influence and to participate in the national effort.

In the 2006 war, and overall even in Israel's other wars, despite their strong motivation, most reservists were left outside the realm of contribution. The special units must constantly improve themselves, as must the entire military. A change in the operational concept will enable this in the optimal manner. The first alternative, to which the military is heading, is bound up in difficult birth pangs, struggles of prestige, and the slaughter of sacred cows. However, since the leadership role of the special units is only becoming stronger, it is reasonable to assume that if the opportunity is given, they will prove themselves in the coming test.

Notes

1 Ofer Shelah and Yoav Limor, *Captives of Lebanon* (Tel Aviv: Yediot Ahronot, 2007).
2 Tomer Brosh and Yotam Amichai, "Special Units in the IDF: Past and Present," *Ma'arachot* 411 (2007): 14-22.
3 *The Dictionary of IDF Terms*, IDF Operations Branch Training Doctrine, 1998.
4 Yaron Flint, "Development of the Special Forces in the Second World War," *Ma'arachot* 408 (2006): 28-33.
5 Eliot Cohen, Michael Eisenstadt, Andrew Bacevich, *Knives, Tanks and Missiles: Israel's Security Revolution*, Begin-Sadat Center at Bar-Ilan University, 1999, pp. 21-24.
6 The unit that masqueraded as Arabs to go behind enemy lines under cover.
7 Shelah and Limor, *Captives of Lebanon*, p. 15.
8 Shelah and Limor, *Captives of Lebanon*, pp. 260-61.
9 While there were special operations such as Operation Entebbe or Operation Blue and Brown in which soldiers who were not part of the special units also participated, this was more of a gesture to those participants and not a change in command concept.
10 Mem B, "The Special Forces," *Ma'arachot* 297 (1985): 4-7.
11 Brosh and Amichai, "Special Units."
12 Yoaz Hendel, "The Division Commander is Judged by Results, I failed," *Makor Rishon*, June 11, 2007.
13 *Dictionary of IDF Terms*.
14 On standoff warfare, see Ron Tira, *The Limitations of Standoff Firepower: On Standoff Warfare, Maneuver, and Decision*, Tel Aviv: Institute for National Security Studies, Memorandum no. 89, 2007.
15 Tira, *The Limitations of Standoff Firepower*, pp. 35-38.
16 Amos Harel, "Brig. Gen. Russo – Advisor to the General Staff for the Activation of the Special Forces," *Haaretz*, July 25, 2006.