Corporate Generals: The Military Metaphor of Strategy

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INTRODUCTION

The lexicon of modern management vocabulary contains many words that betray a martial origin. These semantics of management are redolent with military phraseology such as tactics, operations, staff and divisions. This idea is extended further when the business world is often recorded in military terms whereby companies become the metaphors for armies and competition becomes a metaphor for war. The application of such military terminology may arise out of the origins of modern business formation in the 19th century. The early mechanistic industrial business structures were based on existing military organisational models and it became the paradox of the modern era of unrestricted *laissez-faire* and private enterprise that it had been forced to resort to the only other available models of large-scale management: armies (Hobsbawm, 1995). Martial language has since become the common currency of reporting business activity. Thus, the Irish Takeover Panel (*Irish Examiner,* 21 November 2002) reported that it would impose radical controls over the media wars waged by opposing factions in the future takeover battles of quoted companies. The Jersey President of Economic Development commented that the "air price war could be good for customers in the short term" (BBC Business News, 22 September 2003).

However, the use of such metaphors is paradoxical, in that it can create both powerful insights into theory and at the same time it can create distortions so that a way of seeing becomes a way of not seeing (Morgan, 1997). The metaphor can subsequently provide both different and competing perspectives that are neither inherently right nor wrong, which can focus our attention on the salient features of organisations. In reality, no pitched battles or wars are being waged involving death, destruction and conquest, yet corporate success can be hailed as a victory, corporate defeats as the territorial loss of market share. A hostile takeover can become the metaphor for total corporate defeat and subjugation, where the casualty rates are calculated in the redundancies due to rationalisation.

The recognition of these distortions permits the identification of the true metaphor and the ability to appreciate that no single theory will produce an all-

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encompassing view (Morgan, 1997). One management word in particular, strategy, which has become a discipline in its own right, has both an implicit and explicit military antecedence, which, though routinely alluded to in management texts, is inadequately explored. The object of this paper is to redress this imbalance through the examination of historical military, naval and business literature to debate the soundness of the military metaphor that is inexactly accorded to modern strategy.

THE ARCHAEOLOGY OF STRATEGY

Within a business context, strategy is a discipline that is practised by senior management and has been defined as, essentially, "planning or designing to achieve aims, goals or objectives" (Ansoff, 1965). A more recent definition described strategy as "the direction and scope for the organisation through its configuration of resources within a changing environment to meet the needs of markets and fulfil stakeholder expectations" (Johnson and Scholes, 1999). In temporal measurement, strategy is a parvenu, since it did not become a subject of serious management education until the 1970s, although it had irregularly appeared after 1945 in the guise of managerial science or managerial planning. The word strategy is derived from the Greek "strat-egos" meaning the "army's leader" or, in contemporary language, a general. The military antecedence of the word strategy thus becomes apparent and the implication is that universal strategic concepts derived from a martial framework became applicable to commercial practice (Cummings, 1993).

The concept of military strategy, though, should not be viewed solely as the knowledge construct of a Western philosophy but one that was recognised in both the Far and Middle East. Recently, it has been fashionable to quote the ancient Chinese author Sun Tzu who wrote *The Art of War* around 600 B.C., which contains many contemporary maxims that are thought applicable to a modern business environment. Sun Tzu's text has become so popular that it has achieved recent best-seller status – two millennia after its first appearance. He added a caveat to his framework of guiding principles by stating that its successful application required leaders who were wise, humane, sincere, courageous and strict – characteristics that can be absent amongst some senior managers, as reflected by certain recent corporate scandals. Sun Tzu's ideas have recently been reduced to short, pithy aphorisms contained within six principles by McNeilly (1996).

The popularity of this ancient text reinforces the modern managerial attachment and reluctance to abandon the military metaphor as both a source of guidance and inspiration. Nevertheless, it is within Western philosophy that the main influences of military strategy are to be discovered, though one writer (Bracker, 1980) has gone so far as to identify strategy as first appearing in the Old Testament of the Bible, but he mainly focuses on strategic origins in the texts of the ancient Greeks, "strat-egos" as planning the destruction of one's enemies through the effective use of resources. Bracker controversially lamented the disappearance of the strategic idea that had featured in the works of Homer,

Euripides and Socrates through the fall of the Greek city-states and failed to reappear until after the Second World War. The ancient Greek writer, Aeneas Tacitus, "The Tactician", was identified as the provider of the earliest surviving strategy text from the 4th century B.C. when he described the preparations and provisioning for war along with encampments and stratagems. It is on this basis that he is identified as the first author of strategy.

Table 1.1: Sun Tzu Strategy

Sun Tzu Strategy	Contemporary Strategic Equivalent
Win without fighting	Capture the market without destroying it; avoid fierce price competition that renders the remaining business unprofitable
Avoid enemy's strengths and attack his weaknesses	Use intelligence and deceit to achieve this
Know and understand the enemy, yourself and the terrain	SWOT analysis
Think ahead and act fast	Prepare for potential competitive reactions; always be ahead of your competitors
Be proactive rather than reactive	Especially in deciding and dictating the nature and strength of the competition
Trust and treat your own people fairly	Your confidence in your workforce will be well rewarded

Bracker's allegation that strategy disappeared until post-1945 ignores several important military and naval theoretical texts that were produced during the intervening period. *Outline of Tactics* and *O Strategos* (the general), written by Greeks Asclepioditus and Onasander, were both translated into Latin and remained popular in Europe until the 18th century, as did the Roman Frontius's *Strategemata*, which has been translated as meaning "tricks of the trade". A less well-known text, simply because it was not produced in the West and in Latin, was the *Straegikon of the Byzantine Empire*, which advocated an adherence to flexibility, secrecy and guile to achieve victory. The medieval period remained barren of any original thought in this area and it was only during the Renaissance that new texts began to appear. Macchiavelli is often cited as one of "the makers of modern strategy" from his work *L'Arte Della Guerra* (1520–1) and he remained highly regarded until the 18th century, despite his lack of first-hand military experience. Macchiavelli based his ideas on his studies of ancient Rome and the classical texts, so his work is lacking in originality. He advised that "a commander should never fight a battle unless he has the advantage, or if he is not compelled by necessity" and the general was "to have near him faithful men skilful in war and prudent, with whom he continually advises". Finally, he adds that when "your enemy is near to desperation … you ought to avoid battle so far as in your power".

The era of modern military strategic thinking began in the intellectual turbulence of the Enlightenment. This Age of Reason produced a transition from homo civilis to homo economicus, which involved the rationalisation of selfishness and self-interest, the privatisation of virtue and the demoralisation of luxury, pride and avarice (Porter, 2000). The high priest of political economy advocated this idea. Adam Smith in his seminal *Wealth of Nations* (1776) stated that society would grow into "a properly commercial society" whereby minimal government interference would be exercised in the economy. The new professional armies of the period witnessed the reintroduction of universal methods of discipline unknown since the classical era.

It is within this economically rational driven age that another metaphor of the man-machine was first formulated and encountered in both the new armies and industrial organisations. This was because the manoeuvres and military drill of the new armies required the discipline and co-ordination of docile bodies of soldiery so that the body became "manipulated, shaped, trained, which obeys, responds, becomes skilful and increases its forces" and at the same time produced the insidious militarisation of the large workshops (Foucault, 1991). It has been argued that such machine-based organisations became bureaucracies, which have subsequently shaped the basic perceptions of organisation (Morgan, 1997). The return to the classical ideas of organisation was successfully demonstrated by King Frederick the Great of Prussia, who is perceived as the archetypical military figure of the man-machine ideology since he had an infatuation for mechanical automata. Morgan attests that, "Much was learned from the military ... (the Prussian Army) ... had emerged as a prototype of mechanistic organisation. He borrowed much from the practice of the Roman legions, and the reformed European armies of the sixteenth century" and Prussian success led to the replication of Prussian methods throughout Europe.

The first acknowledged writer of strategy in this period was the Prussian Von Buelow (1799) who wrote *The Spirit of Modern War*. Buelow departed from previous ideology by placing greater reliance on the use of maps, maths and geometry so that generalship no longer had to be carried out directly in the field but could be successfully conducted from a military headquarters by issuing directions and orders to units via a staff. This development may be regarded as the development of a new type of scientific strategy, a precursor of the information age that heralded a move to exercising control and direction through a bureaucracy rather than through direct personal management. The Prussian defined strategy as "all military movements out of the enemy's common range or range of vision" and tactics as "all movements within that range" (Van Creveld, 2000). Von Buelow placed greater emphasis on preserving lines of communication and supply, focusing on organisational, technical and tactical aspects of large-scale operations. A similar situation began to arise in the business world with the growth of entities that became too large and impracticable for individual owner/manager control. Increasingly, the manager became secluded from the direct workplace, remote in his office, the equivalent of the military headquarters, measuring performance via regular reports and issuing orders

through their middle managers, the equivalent of the army staff officers. Thus was born the classic "command-and-control" system of organisation which manifested itself in the M-Form of organisation structure (Talbot, 2003).

Von Buelow, who was ridiculed by Tolstoy in his novel *War and Peace*, remains relatively unknown in comparison to the more famous Swiss, Jomini, and the Prussian, Von Clausewitz. Jomini fought in the army of the Emperor Napoleon I, became a chief of staff to Marshal Ney and later served with the Russian Army. He expanded on Buelow's ideas in his *Treatise on the Grand Operations of War* (1804–5) and *The Art of War* (1830), introducing the concept of the theatre of operations, whereby operations were conducted against multiple enemies (the equivalent of a company trading in the marketplace with many competitors) and the zone of operations, which was the space between army's base and objectives (the current business position and the ultimate business goal). Great reliance was placed on securing lines of operations for supplies and cutting the enemies' lines. This would either force the enemy to surrender (which happened to the Austrians at Ulm in 1805) and save them the expense of direct battle or, more usually, place the enemy at a severe disadvantage for a confrontational battle of annihilation.

Von Clausewitz, arguably the most famous and recognised of military theorists, served on the Prussian military staff and was later in charge of the staff college, the Kriegsakademie (founded 1810) in Berlin. His most famous and often-quoted maxim is that "war is simply the continuation of policy by other means" and if the military metaphor is to be believed, then business strategy is the natural extension of business tactics. He saw strategy as the art of using battles to gain the objectives of the campaign, "no one starts a war – or rather, no one in his senses ought to do so – without first being clear in his mind what he intends to achieve by that war and how he conducts it". In his work *On War* written in 1832 he stated, "the best strategy is always to be very strong, first in the general and then at the decisive point". It was notable that the establishment of a Prussian general staff in 1803 had created the first of its type. Its function was to apply the same principles of rational organisation and planning to war that were already transforming the wider European society (Dyer, 1985). The Kriegsakademie's function was to educate and instruct its officer corps where admission to its ranks no longer depended on aristocratic birthrights but on education and examination in military subjects. Promotion was governed by performance reports and further exams so that only the most gifted individuals were promoted to the senior ranks of the officer corps. The efficient Prussian model of administration and co-ordination proved so successful in the Napoleonic campaigns and other wars of the 19th century that it became the international benchmark of excellence and was replicated unevenly elsewhere in other nations. Therefore, it could be argued that the senior Prussian officer recruitment and education process was the forerunner of the 20th century business schools, which, like the Kreigsakademie, have proliferated.

In Great Britain, the then leading industrial nation, the army General Staff was not formed until as late as 1912. This may reflect the retention of an amateur

and gentlemanly philosophy on war and its theories, which may be indicative of a wider cultural rejection of "professionalism" and an adherence to an outmoded form of paternalistic and gentlemanly capitalism. The British attitude of the period may be encapsulated in the comment of the longstanding British Army Commander in Chief during this period, the notoriously reactionary Duke of Cambridge, who is reputed to have said, "I abhor all change even when it is for the better" (Keown-Boyd, 1986). This mindset may largely reflect the absence of British contributions to strategic ideas in all fields, which contributed to overall British industrial decline (Weiner, 1992).

However, Clausewitz and Jomini still retained the overall "big idea" that strategy was designed to defeat the enemy's main army in a battle of annihilation and then seize his capital city. This was inelegantly summed up by the American Civil War Union General Sherman as "getting there fastest with the mostest". The professional military view remained attached to this concept, which became inapplicable in Western capitalism, where the dangers of monopoly capitalism became unacceptable and were progressively regulated against by national governments. It is here that the paradox of the military metaphor breaks down. Military strategy is focused on achieving the ultimate victory of one side but in the business arena corporate victory is regarded as a type of corporate dictatorship that must be resisted at all costs.

Other writers (Hoskin, Macve and Stone, 1998) have seen the birth of modern business strategy in the naval strategy enunciated by the American, Alfred Thayer Mahan (1890 and 1892) at the end of the 19th century. Mahan became acknowledged as the pre-eminent naval theorist of his day and his texts had a profound impact that extended beyond purely naval staffs, which strongly influenced political opinions prior to the Great War. Mahan argued that by controlling the sea-lanes, exercising pre-emptive control and restricting enemy action, victory could be achieved and conflict avoided. Strategy thus became a constant vigilance and boundaries became irrelevant impositions. Mahan is similar to Von Buelow in that he defined theatres of war and victory accrued from dominating theatres and denying these to the enemy. Logistics had become all important in this type of strategy. The two world wars, particularly the Second World War, revealed that the new industrial wars were won by a strategy that operated globally and in theatres of war where economic resources and production capacities proved dominant even when faced by occasionally superior tactics.

It is conventionally assumed that the strategic military success of the Second World War achieved by the western allies somehow smoothly transferred into the business environment in an era where military terminology was well known and in widespread use. It is from post-1945 that managerial science appears in education, accompanied by an increasing and continuing plethora of texts. Bracker identified the first cohort of business strategy writers as emerging in 1947, with Von Neumann and Morgenstern's "games theory", to be followed by a profusion of similar writers. The emergence of business strategy under various nomenclatures arose because the drivers of change as identified by Ansoff (1969)

comprised a marked acceleration of change within firms and the accelerated application of science and technology to the process of management. The American business and economic historian Chandler (1962) differentiated the emergence of the strategic from the tactical thus: "Strategic decisions are concerned with the long-term health of the enterprise. Tactical decisions deal more with the day-to-day activities necessary for efficient and smooth operations." In the military sphere, the adoption of nuclear weapons ensured that successfully fighting a nuclear war by the opposing power blocs became impossible, so mutual deterrence operated MAD (Mutually Assured Destruction). Nonetheless, the NATO strategic idea of the 1960s of operating a flexible response strategy by fighting a conventional war to oppose Soviet aggression without resorting to nuclear weapons was largely illusory, because imminent defeat or stalemate for either side would have initiated a nuclear strike and subsequent levels of massive retaliation that would have led to the total devastation of both opponents.

The archaeology of military and business strategy has now been explored and arrives at the present day. Outright price wars and unrestricted competition to the death – even if the political and economic structures allowed them to occur – are unlikely to succeed, providing at best a phyrric victory that weakens the surviving company to the point of collapse.

> Violence between great opponents is inherently difficult to control, and cannot be controlled unilaterally … once hostilities begin; the level of violence has in modern times tended always to go up. (Kaplan, 1983)

Therefore, limited advantages may be sought at the sub-nuclear level in conventional business warfare without the threat of loss of total market share and financial collapse. If the analogy of the Cold War is invoked, it is important to maintain position and strengths and invest in technology so that the opposition has to invest at similar levels until it ultimately implodes and business dominance is attained.

CONCLUSION

Is the military metaphor sufficiently robust to view senior managers as the equivalent of military staffs employing military strategies to the battlefield of the global marketplace with its theatres and zones of war? The ostensible semantic links and martial management language provide an identifiable historical timeline back to the ancient Greeks and Sun Tzu. However, comparing modern industrial and post-industrial society with agricultural societies is not comparing like with like and so the metaphor is adequate only up to a point, when it disintegrates. The same may be said of the Clausewitz school of the total war of annihilation, since, to adapt Clausewitz's metaphor, business is simply not the continuation of a war policy by other means. The Mahan thesis modified by the nuclear age is more plausible by seeking victory without conflict. However, these military metaphors have a strictly limited

scope. Only open and limited price wars between companies offer the application of the war analogy. In a modern company, the ultimate ruler or commanding officer is the shareholder but there is no military equivalent of the customer. Companies are designed to service the customer stakeholder group and the coherence of the military analogy then falters. Chandler (1977) even states that the initial development of complex business organisations from mid-19th century USA cannot be attributed to the military sphere. Military strategy has noticeably not featured strongly in the works of the major management gurus other than as a cursory reference in their writings or in the strategic tools employed in the business world.

Table 1.2: Timeline of Military and Business Strategy

Timeline	Military Strategy	Business Structures	Business Strategists and Strategic Tools
BC	Aeneas Tacitus Sun Tzu Asclepioditus Frontius Onasander	Owner Managers – local markets	Command and control
AD 500	Byzantine Straegikon		
1500s	Machiavelli		
1799–1830s	Von Buelow Jomini Clausewitz	Emergence of large enterprises, companies, shareholder stakeholders and national markets	
1899	Mahan – naval strategy		
1945–1950s	Nuclear deterrence – MAD theorem	Regional markets	Van Neumann and Morgenstern – games theory Drucker –The Practice of Management
1960s			Chandler and Ansoff – SWOT
1970s		Globalisation	Professional strategy firms – Value Chains
1980s			Porter and Drucker – global quality, TQM,
1990s			Mintzberg – Core Competency Value System

Nevertheless, the military metaphor should not be totally rejected, as it offers useful though limited contributions to modern strategic discourse. In contrast, others have argued that there is a more continuous and explicit link: "Business

cannot now distance itself from the military discourse of strategy by externalising it as a post-Second World War import: rather both business and war have become the war of the accountants" (Van Creveld, 1977). Indeed, the education of modern managers remains reluctant to abandon the military metaphor (Table 1.3), which inevitably must condition the mindset of future generations of corporate leaders.

Table 1.3: Strategy, Tactics and Operational Control

Example	Army	Industry
Main objective Secondary objective	Defeat Enemy Preserve our forces	25% return on capital Increase market share
Strategy	Attack through border Use 24,000 infantry	Sell on the basis that a 20% increase in sales and production capacity will reduce unit cost by 25%. Use £10m capital
Tactics	Send 3/4 troops in first; hold 1/4 reserve; 12,000 infantry to seize ports at night; 6,000 to sever communications; 6,000 in reserve.	Drop selling prices now by 5%. Offer 5% bulk buying discounts.
Operational control	Monitor progress towards ports. Re-deploy if opposition stiffer than expected.	Monitor sales progress. Ensure machines and labour are ready to take up 20% unused capacity.

Source: *Chartered Institute of Management Accountants, 1991*

However, modern post-industrial organisations are less rigid and hierarchical, since contemporary business operations require more flexible structures that are not so reliant on the command-and-control structures of another era. The new skills of management are softer and the days when chief executive officers announced orders and barked, via mid-level sergeant managers, at docile privates who blindly obeyed them are over (Cloke and Goldsmith, 2002). Therefore, the apparent military link is deceptive and ultimately illusory. At the same time, it remains seductive and damaging, as it subconsciously appeals to the inherent and timeless aggressive human instincts aimed at confrontation, which are hidden beyond a thin veneer of civilised behaviour and convention. Even now, in the era of modern HRM, it is being reported that a "corporate war" is raging over the "the war on talent" where such terms allegedly proliferate in senior HRM circles (Reeves, 2003). Nevertheless, business language is not the same as military language and its excessive application can desensitise those who apply it to its true meaning. It should be remembered that the military metaphor works only up to a certain level before it breaks down and then it becomes of restricted relevance, but at the beginning of the 21st century it still continues to condition an overall approach to strategic thinking that is hard to abandon.

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