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## What makes a good strategic concept?

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### ABSTRACT

Strategic concepts are more than simply academic concepts but must also relate to strategic practice, which affects how we should gauge concept quality. Rather than purely academic measures, strategic concepts must also be judged according to their usefulness for practice. Yet the relationship between general theory and specific practice has hardly been explored, a task this article undertakes. Academic theory generates ad hoc concepts, which are used to build specific theories of victory, which are used to generate orders. The measures by which to judge a concept's quality depends on where in this multi-phase transference process any concept is located.

The strategic studies community incessantly argues over concepts, their definitions, their implications, their use, and so forth. There is a trendy bias in favor of novelty, given how fashionable are such concepts as hybrid warfare and the gray zone are; but there is also a countervailing current in favor of conceptual stability and against most novel concepts. This debate is critical for the field. As Rear Admiral Henry Eccles asserted, “I have stressed the conceptual approach because fundamental concepts, even though never completely defined or even verbalized, form the ultimate foundation for men's thoughts and actions. I have stated structural relationships because a sense of structure is vital to any theory.”<sup>1</sup> Collective thinking is difficult if there is little or no consensus on concepts and their interrelationships.

Yet the debate is often tiresome as well. Those advocating novel concepts rarely properly justify their inclusion, or explain how they fit, into strategic studies' conceptual ecosystem. Those seeking to rebut these inclusions often rely on the authority of existing theory to argue against the new concepts, even though the advocates of novelty implicitly or explicitly do not believe (fully) in the authority of existing theory. The result is that the two sides usually talk past each other, each more effectively addressing his own rather than the other side.

There are undoubtedly various reasons for such a state of affairs, but one is that insufficient thought is dedicated to what makes a good concept. Hence this article therefore explores what makes a good *strategic* concept, as distinct from a good concept in general. It discusses how social scientists have reflected on the problem of conceptual quality before turning to how the addition of ‘strategic’ affects the standards of quality, notably the importance of transferability to the world of action. This leads to

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a final discussion on what transferability looks like and how concepts should reflect their particular home stage in that transfer process.

### Quality for academic concepts

Social science scholars not infrequently neglect the quality of concepts they use in their research. Despite some reflection, the work done is insufficient. The result is an overall difficulty, if not outright incapacity, to assess the value of either existing or newly introduced concepts, leading to lamentation and pessimistic forecasts of the future of social sciences.<sup>2</sup> Only a few scholars have discussed concept quality, notably Gary Goertz, John Gerring, and Giovanni Sartori. Key elements of each of their particular perspectives on concept quality are discussed, to establish how the quality of academic concepts is understood.

Defining and understanding concepts as such is the crucial first step to engaging issues relating to their quality. Gary Goertz provides the most in-depth bedrock discussion of concepts in the social sciences. Fundamentally, he suggests that “a concept involves a theoretical and empirical analysis of the object or phenomenon referred to by the word. A good concept draws distinctions that are important in the behavior of the object.”<sup>3</sup> He distinguishes between two schools of concept definition, nominalist and realist. The former holds that conceptual definitions depend wholly on the definer; the latter, by contrast, holds that concepts nonetheless comprise (or should comprise) essential characteristics which define the concept’s essence, even as its more superficial characteristics change. Although one must acknowledge that the definer matters—there would hardly be so many varied definitions of strategy otherwise—it is the realist school of concept definition which is more useful. The realist school allows Goertz to claim reasonably that “[c]oncepts are theories about ontology: they are theories about the fundamental constitutive elements of a phenomenon.”<sup>4</sup> For Goertz a concept is inherently both a theory and an argument concerning what is (most) important about a particular phenomenon.

Goertz posited that concepts are constructed on three levels: the upper level being the central concept itself, the middle layer containing the secondary but still abstract characteristics which comprise the central concept, and the bottom level concretely identifying those abstract characteristics in empirical evidence. The middle layer may arguably be the most important, as it comprises the details of the ontological theory, suggests the relationships among the key characteristics which make up the concept, and is what scholars seek to identify in reality. From it, two styles of concept structure emerge: the classic philosophical logic of necessary and sufficient conditions, and the modern ‘family resemblance’ structure. The first is logically strict; if all the conditions which must be met are not, then the real world phenomenon in question is not an example of the concept. The second is looser; the middle level represents a set of characteristics of which any individual real world example only needs meet a given number of them.<sup>5</sup> The former classical model remains dominant within social sciences as a whole, including strategic studies, although even in the study of strategy the family resemblance structural approach may be contextually useful.

For Goertz a conceptual definition has to be more than a list of characteristics; it must be prioritized and sorted according to the concept’s structure. Concept developers

also should consider whether it is possible to substitute another characteristic for any of those already identified, without changing the concept. Explicit links are drawn between middle level characteristics and their real world indicators, as well as between the concept's own middle and upper levels.<sup>6</sup> However, Goertz's requirements ultimately pertain largely to the process of concept development, and through that lens only indirectly cast light on the qualities of a good concept. In most respects, his model can be summarized as doing one's due diligence during concept creation.

The social scientist John Gerring has engaged more explicitly with concept quality, focused on eight measures: familiarity, resonance, parsimony, coherence, differentiation, depth, theoretical utility, and field utility. Some are self-explanatory. A concept may be more or less familiar to its audience; in principle, the more familiar a concept the better. Resonance is similar, pertaining to the attractiveness of the term itself. Parsimony relates to how succinct both the term and its defining characteristics are; in principle, the shorter and more parsimonious a concept, the better. Depth may be set in contradistinction to parsimony; it refers to the implicit qualities of a concept which necessarily emerge from the interaction of its defining features—but without being defining features themselves. Coherence describes the degree to which the defining features belong together, i.e. whose conglomeration makes sense, most effectively gauged by the degree to which they reflect the essential characteristics of a phenomenon. Differentiation is the reverse side of coherence, being the degree to which the concept may be distinguished from related concepts. Gerring suggests that operationalizing a concept—i.e. developing Goertz's lower level—is crucial to effective differentiation. Theory utility refers to the concept's usability for developing useful theories; by contrast field utility reflects the degree to which a new concept affects the ecosystem of surrounding concepts in the chosen academic field.<sup>7</sup>

This final issue of field impact became a major concern for Giovanni Sartori. He lamented what he called the “frenzy of novitism”, manifested through continual development of new ideas, without concern either for preexistent ideas or for the actual usefulness of new concepts for the field as a whole. He pointedly reminded his readers that

meanings are not arbitrary stipulations but *reminders of historical experience and experimentation*. Most of our political concepts were shaped and acquired their meaning out of a survival of the fittest process. Terms such as power, authority, violence, coercion, law, constitution, liberty, etc. (thereby including consensus) reflect experiences, behavioral patterns, and perceptions resulting from historical learning; they are, so to speak, *existential reminders*.<sup>8</sup>

Theorists need to note and recognize the value of existing meanings when creating new concepts and altering existing definitions. For Sartori, due diligence in conceptual formation requires acknowledging that conceptual change *should* have a high barrier of entry because its worth needs to be justified both to and for the entire field. Justification involves “showing that (1) no field meaning is lost, and that (2) ambiguity is not increased by being transferred into the rest of the field set.”<sup>9</sup> Sartori favored conceptual conservatism.

The logic of his case is strong, but there is also hidden danger in his stance. The notion of conceptual existential reminders threatens to turn conceptual conservatism

into unthinking tradition—conceptual beliefs and definitions held simply because they happened to endure from the past. Challenges to the existing conceptual ecosystem usually emerge out of dissatisfaction in or with the field (or through lack of familiarity with the field, as when those from beyond the field seek to contribute to it). In such circumstances, justification is not something which only the conceptual challenger must provide. The existing conceptual order should in principle also justify itself: why is it still appropriate, useful, and so on? Too rarely do conceptual insurgents in strategic studies properly justify themselves, but also too rarely is the existing conceptual order justified effectively. Rarely does either side of conceptual discussion debate with due diligence.

Concepts do not stand alone; they are used as building blocks for theory-building. In this context, that Goertz, Gerring, and Sartori are all social scientists is crucial to understand their perspective on the relationship between concepts and theory. All three agree that, in Sartori's words, “[a] concept is empirical if, and only if, it can be rendered in *testable propositions* that confirm it (in some respect or extent).”<sup>10</sup> Theory is understood to be logically deductive and predictive. Concepts should be explicitly designed to contribute to deductive and predictive theories, and their overall worth is tied to how effectively they can contribute to logical deduction and outcome prediction through a developed theory.

### Adding ‘strategic’ to the concept

Academic reflections on the quality of concepts are a useful although comparatively rare starting point. Yet as an academic field strategic studies has always kept one eye on—and a foot in—the realm of real strategic practice. The modifier ‘strategic’ requires that the quality of concepts be measured not merely by scholarly considerations but also by the demands of actual strategic practice. When adding ‘strategic’ into the mix, we must first explore what it means and demands of us before we can answer what makes a good strategic concept.

‘Strategy’ and its adjectival form ‘strategic’ are hugely familiar and resonant terms in mainstream pop culture, let alone within the field of strategic studies. Gerring warns that “[t]he degree to which a new definition ‘makes sense,’ or is intuitively ‘clear,’ depends critically upon the degree to which it conforms, or clashes, with established usage—within everyday language and within a specialized language community.”<sup>11</sup> ‘Strategy’ and ‘strategic’ are so widely used and arguably misused and abused that not only is there a wide gulf between quotidian and specialized usage, but even within strategic studies itself the meaning of ‘strategy’ varies from the broadest ends, ways, means conceptualization to much more specific definitions of military strategy. The term ‘strategic’ is similarly contested between mundane and specialized communities, as well as within its specialized community. These gaps of definition have rendered strategy *too* familiar, and in the process its definition too casual. ‘Strategy’ here is stipulated (i.e. asserted on the author’s own authority for the purposes of argument) as simultaneous engagement with two key relationships: first, that between military power employed through tactics, and political consequence; second, that between adversaries. Hence ‘strategic’ may be defined as that which pertains to these two relationships, although discussion of ‘strategy’ and ‘strategic’ does not end here.

Theorists have long identified interdisciplinary dimensions of strategy, most comprehensively Colin Gray's seventeen, divided into three categories: 1) people and politics (comprising people, society, culture, politics, and ethics); preparation for war (economics and logistics, organization, military administration, information and intelligence, strategic theory and doctrine, and technology); and 3) war itself (military operations, command, geography, friction/change/uncertainty, the adversary, and time).<sup>12</sup> These dimensions not only pose a substantial challenge to conceptualizing 'strategic'; the task may plausibly actually become totally unrestrainable as a result. A clear relationship between any and each of these dimensions influences the thought and practice of strategy, to varying degrees according to specific context. In this basic sense, any of these dimensions can and does pertain to strategy, suiting the modifier 'strategic'. Some have already coalesced with 'strategic' to form specific, well known terms, such as strategic theory or strategic culture.

Two diverging trains of thought result. First, why not also apply 'strategic' to organization, friction, time, or other dimensions? Sustaining or refuting each would require a specific inquiry into the engagement between strategy and each individual dimension to determine whether or not the compound concept makes sense. Second, and in contradiction, in assuming that generally that any dimension may be described as 'strategic', one may dilute 'strategic' into insubstantiality and implausibility when applied to almost, if not actually any, portion of the human experience and so fail to differentiate between strategic and non-strategic.

Crucial to defining 'strategic' are Bernard Brodie's observations on the relationship between theory and practice in strategic studies. "Strategic thinking, or 'theory' if one prefers, is nothing if not pragmatic. Strategy is a 'how to do it' study, a guide to accomplishing something and doing it efficiently ... Above all, strategic theory is a theory for action." He concludes this line of thought by acerbically asking "[w]hat could strategic theory possibly be for if it were not meant to be transferable to the world of action?"<sup>13</sup> The link between theory and practice in strategic studies is crucial; ultimately, someone somewhere has to transfer or be able to transfer concepts from strategic theory—whether developed by academics or practitioners—into actual practice. A 'strategic' concept therefore plays a role in Brodie's inherently interdisciplinary transference process.

In such a relationship, the nature of strategic practice is critical. Most familiar, particularly popular and nonmilitary, interpretations of strategy emphasize the central importance of decision-making. This interpretation emerged from Cold War-era strategic studies as well as economics, and also dominates in international relations. Strategy is about decision-making, and once the decision has been made then strategy is essentially completed—implementation is hardly ever considered. Yet strategy, to fulfill its purpose, must necessarily be implemented, and the conduct of implementation determines its success; choice and execution cannot realistically be divorced.<sup>14</sup> When strategy is understood in this full breadth, concept transferability may relate to strategic decision-making or to subsequent implementation.

Two aggregate schools of thought have emerged from history on what transferability looks like. The first offers direct prescription on how to wage war. Sun Tzu's *Art of War*, for example, belongs to this category, reflected in his boast that, "If a general follows my [methods for] estimation and you employ him, he will certainly be victorious

and should be retained. If a general does not follow my [methods for] estimation and you employ him, he will certainly be defeated, so dismiss him.”<sup>15</sup> The main characteristic of this perspective is that it *instructs* its audience *how* to wage war, often through the enunciation of particular principles, appropriate adherence to which guarantees military success. This idea of transferability is direct and immediately practical.

The second notion of transferability was pioneered primarily by Carl von Clausewitz, and focused on mentally preparing practitioners for the challenges of war they might face during their careers. Clausewitz argued that theory “is meant to educate the mind of the future commander, or, more accurately, to guide him in his self-education, not to accompany him to the battlefield.”<sup>16</sup> Good theory, used effectively to educate military practitioners, to the point that theory-driven thinking becomes both quick and instinctive, contributes to command talent, which in turn contributes to command performance in war. Although these two schools of thought disagree on how exactly to transfer concepts, they do agree on the fundamental wisdom and necessity of transferring concepts to strategy’ implementation.

A concern specific to concept transferability is conceptual depth. Gerring wrote of depth that “[t]he utility of a concept is enhanced by its ability to ‘bundle’ characteristics. The greater the number of properties shared by the phenomena in the extension, the greater the depth of a concept.”<sup>17</sup> Yet Gerring wrote solely from the perspective of concept creation; for concept use and transferability one must consider how the various definitional attributes interact to create hidden but still implicitly, even subconsciously, accepted meanings which might limit strategic thinking in practice. One example is gray zone warfare; the concept instills a degree of symmetrical thinking. Once Western strategists find themselves in a gray zone, they tend to think symmetrically within that zone. This in itself is already problematic, but the situation is exacerbated as gray zone aggressors have the initiative and can wear down the defenders, whereas gray zone defenders must hold every inch, a prohibitively expensive policy. This inevitably reflects the defender’s comparatively low political will and interest in definitively settling the issue at stake, as doing so will almost certainly cause wider conflict (and so desultory gray zone actions may nonetheless be the wisest policy!). Yet this array of implications is packaged into and beneath the gray zone’s main definitional characteristics and emerges logically from them.<sup>18</sup>

A final vital consideration touches upon the nature of theory. The academics Goertz, Gerring, and Sartori all thought in terms of formal, predictive social science theories. Yet, barring the arguably *prescriptive* theories of thinkers such as Sun Tzu or Jomini, strategic theory generally does not take this form. It is instead a *descriptive* theory. It organizes, categorizes, and defines; it explains; it relates the field to neighboring fields; and it allows its user to anticipate the future.<sup>19</sup> Anticipation differs theoretically from prediction. Prediction is a function of the theory; once all the variables are filled in, the theory churns out an answer on its own. Anticipation requires active user engagement throughout the process; without the user actively engaging the theory, no vision of the future results. The logic of application differs between predictive and descriptive theory, a difference which helps determine the transferability of concepts into practice. Finally, strategic theory “derives its authority from two distinctively different sources: the empirical-historical and the logical.”<sup>20</sup> Theory which lacks substantive support from either source will not merely be ill-considered and inapt, but even dangerous.

The nature of theory may also be engaged another way: systemic versus ad hoc. Systemic theory provides a system for the user, predictive or a descriptive, which is itself essentially a system of thought (and differs from systematic theory, i.e. a theory methodically developed by following a preexisting system of thought or methodology) Systemic theories are unsurprisingly best applied systematically. Ad hoc concepts and theory are developed in response to specific events or challenges, usually involving new concepts, and might be considered representative of Sartori's 'frenzy of novitism'. In a recent article I implied that ad hoc concepts are inherently inferior and damaging to the field of strategic studies, and that systemic theory is to be preferred.<sup>21</sup> In fact, a fuller appreciation demonstrates that both have their place in the field and, just as important, also in the practice of strategy; strategic studies accommodates two levels of theory. First is systemic, general theory with concepts to match; second is ad hoc theory, also with appropriate concepts. The description of theory above encompasses systemic theory; ad hoc theory follows below.

### **What makes a good strategic concept?**

By contrast with systemic, general theory, use of ad hoc concepts becomes apparent when considering a strategy in practice to be a theory of victory or success in practice. As Frank Hoffman has written,

A good strategy must have an internal logic that ties policy to both ways and means to create desired strategic effects. That logic is a continuous thread of thinking that provides strategic intent and informs ways and creates linkages in strategic design that drive the application of means via military operations.<sup>22</sup>

Strategy in practice is inherently specific to a particular set of adversarial actors, a specific time and place, unique political goals and contexts, and so forth. Strategy as a theory of success must encapsulate not only what the strategist seeks to accomplish, with what power, and how, but also with a basic logical sense of why performing the chosen actions in the chosen way will work to achieve the desired political goals. This theory of success might, depending on the particular context, be something formally developed and codified as part of a specific organizational process, it might simply be a flash of intuition in the mind of a military genius, or anything in-between, but some sort of basic theoretical sense inhabits every point on this spectrum of formality and informality.

A theory of success is inherently interdisciplinary and multi-dimensional, reflecting the myriad dimensions of strategy. Each encapsulates to varying degrees issues such as logistics, culture, geography, time, politics, technology, or organization—as they relate both to the strategist and to the adversary. In this way concepts and theoretical insights which may not actually form part of strategic theory, but are imported from other fields, should contribute to constructing a sufficiently robust theory of success. The particularity of a strategist's task in practice is unsuitable for a general, systemic theory. It requires ad hoc concepts, i.e. concepts specifically designed for the immediate task. The theoretical exception is prescriptive principles of war, which within comprehensive sets of principles seeks to combine systemic and ad hoc theory into a single body.

The first phase of transferring descriptive strategic theory to action is to generate ad hoc concepts from systemic theory for purposes of constructing a theory of success for the situation at hand. Fundamental concepts, categories, or dimensions such as 'command' or 'logistics' as a whole are inappropriate, but within themselves carry the necessary conceptual or theoretical seeds to develop the ad hoc concepts to be used specifically to construct a theory of success. An example of this stage of transference is development of the ad hoc concept and doctrine of AirLand Battle out of the more fundamental, if nonetheless theoretically controversial, concept of the operational level of war. AirLand Battle is ad hoc because it was developed specifically for prospective operations in central Europe should the Soviets invade western Europe; it had a clear set of specific contexts which were geographical, temporal, and so on. A fundamental concept cannot be brought into the theater of operations to help guide strategy in both planned and adaptive practice, but it can act as the framework to develop a more context-specific concept or doctrine which *can* be used practically.

The process of generating ad hoc concepts from systemic theory is vital because, in constructing a theory of strategy, the strategist is engaging in abductive logic. Abductive logic is hardly as popular as its deductive and inductive siblings, but in anything which requires practice, performance, and implementation it is decisive. Developed by the American philosopher and logician Charles Sanders Peirce, abductive logic works when one has contextual knowledge and an understanding of the empirical result. From this knowledge, one can piece together a likely process, on the basis of the contextual knowledge, to get from the starting point to the result. Crucially, the abductively derived process is not certain, merely plausible.<sup>23</sup> Abduction is a creative logic to invent a process, a way forward toward a goal. It is the prime logic which underpins all instrumental thinking, including (but hardly limited to) strategic thinking. From a known starting point, given known contextual knowledge and some sort of theoretical understanding, the instrumental thinker—here, the strategist—develops an anticipated process by which the desired political end goal can be reached, together with a sense of why it should work. Strategy can therefore be understood as an act of way-finding and logical discovery to find an appropriate path to defeating the enemy. The creation of ad hoc concepts is the first part of this abductive process. In practice, the development of ad hoc concepts can never keep up with the changing particularities of actual strategic demands; doctrine might last a few years before it must be revised, a decade or so before it should be replaced. There is always lag between the development of ad hoc concepts and the contexts to which the ad hoc concept creation process is responding.

The second phase of transferability immediately succeeds the first: turning a collection of ad hoc concepts into an actual, ad hoc theory of success. Especially in modern militaries, each ad hoc concept is liable to be the product of a different process—the development of logistical, tactical, operational, warfighting, or other doctrines will involve various individuals, committees, or sections and commands. Intelligence which the commander requires to develop a plausible theory of success stems from yet other sources and processes. A specific theory of success is developed from the mass of available ad hoc concepts at the commanding headquarters, generally in dialogue with political authorities. This is the core of the logically abductive process, of imagining a plausible logical and actionable way from the start to the end. Ideally,

this process of theory creation should be undertaken systematically, informed by and checked against the higher level of systemic theory. In practice, this probably rarely happens; practitioners are constrained by fleeting time and may not be so theoretically minded.

The first stage of transferability is a distributed process of developing disparate ad hoc concepts. The second stage is a process of unifying those ad hoc concepts into a coherent theory of success. During the third and final stage of concept transferability, the developed theory of success reaches back into the many practical disciplines and branches of military science which informed it through their own ad hoc concepts. In this phase, the commander and staff generates orders—tactical and operational, logistical, intelligence, and so forth—to subordinates to implement the theory of success against the enemy. Orders tell subordinates what to do, a feature which requires the translation of the strategy's performative requirements into the highly specific features of each involved branch of military science which contributes to, but is not synonymous with, strategy. That is, orders must indicate what the developed strategy expects from tactics and tactical performance, even though the two differ both as disciplines and theories. To serve the strategy most effectively, all branches of military science must be able to communicate among themselves, just as with the strategy. Orders also explain, to the degree necessary, the theory of success so that the commander's subordinates know how their actions are intended to fit into the strategy:

The platoon commander cannot run his platoon without knowing full well what the battalion commander is trying to do. Likewise, of course, he must know what the company commander is trying to do. If he is ignorant of the desired outputs of the two commanders above him, there will be times when he will have to ask what to do, or guess what to do, or wait for orders, all of which will slow down the process which is tactics. The company commander must think into the mind not only of his battalion commander but the regimental commander. The battalion commander must be read into the thoughts and desires of the division commander.<sup>24</sup>

Similarly, a sense of both ad hoc and even systemic theory enables those giving and receiving orders to contextualize the expected actions within a broader strategic understanding.

## Conclusion

Strategic concepts are judged by two measures of quality, scholarly and practical. Scholarly expectations are narrowly academic but result in rigorously developed concepts, according to mainstream schools of thought on what to expect from concepts and theory in the social sciences. Practical, military expectations are oriented toward enabling effective action in the field. Strategic concepts must navigate both. Yet the degree to which strategic concepts adhere to any particular type of measure, scholarly or practical, depends on where it resides in the transference process from systemic theory to tactical orders.

A strategic concept may sit anywhere along this process, as the complete transfer of strategic theory to practice must engage both levels of theory and all three of these stages: the creation of ad hoc concepts, their inclusion into a systematically-developed ad hoc theory of success, and then the generation of practical orders for subordinates

to implement, all of which reflect that theory of success. Yet fundamental concepts and relationships of systemic theory are not intended to be immediately relevant to the generation of orders, therefore, adhering closer to the scholarly rather than the practical. Albeit ideally systematically developed from their guiding, ad hoc theory of success, orders in the theater of operations are naturally ad hoc, whose practical demands obscure any scholarly considerations.

What makes a good strategic concept depends wholly on where in this process one positions oneself. General, systemic theory and fundamental concepts are critical for effective strategic thinking. Ad hoc concepts and theories of success are inherently necessary for practice. Both are necessary for strategic studies as an academic field to be effectively connected to the practice of strategy, and vice versa. Reciprocal influence among all the phases of transference and levels of concepts and theory, including general, systemic level learning from both the practical and the ad hoc, are inevitable. Ad hoc concepts are not inherently damaging to the field or to general theory, but they *can* be if generated without a general, systemic, and fundamental conceptual framework (hybrid and gray zone warfare are examples) and/or rebound back from the ad hoc levels, affecting the systemic level in ill-considered ways.

## Notes

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