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The Underlying Causes of Military Outsourcing in the USA and UK

Bridging the Persistent Gap between Ends, Ways, and Means since the Beginning of the Cold War

Introduction

Much has been made in recent years of the outsourcing of military responsibilities, a practice most commonly associated with the 'privatisation of security' and the notorious, now defunct security company Blackwater. The tendency to subsume the practice under the header 'privatisation of security' is understandable insofar as scholars almost exclusively study cases of private armed security provision. It however also exposes a weakness of the literature, namely the tendency to overgeneralise about the wider phenomenon of military outsourcing by extrapolating from the much narrower and more recent practice of private security contracting. Although the literature offers several functional, ideational, and political-economic explanations for the rapid rise of military contractors in recent decades, it nonetheless misses out on several broader, longer-term developments that were instrumental in enabling the resort to private military services and that furthermore long predate the turn to the private *security* industry. Moreover, these developments implicate not only defence policy and particularly acquisition, but also fundamental questions of foreign and security policy and policy making.

Focusing on the USA and the UK, this article first sets out to show that the contemporary wave of military outsourcing stretches back to the beginning of the Cold War in the 1950s and not only to the demobilisation of many armed forces after its end in the 1990s or the neoliberal reforms introduced under and since the governments of U.S. President Reagan and UK Prime Minister Thatcher in the 1980s, as the literature typically argues. Secondly, contemporary contracting will be shown to be most closely tied to military support functions in support of wider foreign and defence political objectives. Security services in both states may well

not have been outsourced so swiftly, if at all, without decades of experience in outsourcing a wide range of military logistics functions and the resultant vehicles, processes, and familiarities of public-private partnerships that originated there.

The article builds its argument by way of tracing states' foreign political strategies and global defence postures – ideationally and in practice – and their (lack of) correspondence with the state's defence economics. These challenges to reconcile ends, ways, and means will be shown to be key underlying long-term causes of the outsourcing of military responsibilities. So far, the literature points to individual instances such as low troop numbers after the invasion of Iraq in 2003 as contributing to the surge in contractualisation in specific theatres of war (see e.g. Kinsey 2009a, p. 33, Krahmann 2010, pp. 199-200). In reality, however, tensions between ends, ways, and means have existed since the 1950s. While Cusumano (2015) approaches this view in his examination of mobilisation constraints, he neglects capability gaps, expansive strategic postures, and the ideational buy-in into pro-privatisation logics. The strategy-resources gap has been a key contributor to the political and defence-economic changes which have led armies to increasingly turn to the private sector for support with realising their strategic objectives. Strategy and posture, together with their defence-economic and technological implementation, are thus underlying and not merely ancillary factors to these states' propensity to outsource.

This study complements the established literature in two ways. First, it exposes an additional, underlying layer of causal factors upon which much existing scholarship implicitly rests, i.e. a gap between strategic commitments, technological requirements for warfighting, and available resources, and these factors' long-lasting impact on how states supply their armed forces and, ultimately, war. Being inextricably linked to the problématique of reconciling ends, ways, and means, this fundamentally and directly implicates the formulation of foreign and defence policy. Secondly, it suggests that the background and significance of private *security* contracting should be reappraised, at the very least insofar as Western armies are concerned, and thus a differentiation made between the 'markets for force' in these and other 'strong', Western states on one hand, and 'weak' states on the other. This more recent phenomenon should be seen in the wider context of public management reform, privatisation, and military outsourcing rather than as a separate, essentialized phenomenon that operates somewhat

independently from the wider defence industry. The historical record that I discuss below suggests that it is closely tied up in much wider political and economic developments and that its expansion from the 1990s onwards likely benefited from the decades of experience which states and their armies had of working with various military service providers. From this angle, the private security industry, certainly in the USA and UK, appears more like the most recent stage of this decades-long process, and as yet another sector of the much wider public-private defence enterprise in which states turn to private industry than as an entirely 'new beast'. All regulatory and legal idiosyncrasies arising out of the potential use of force by security contractors aside, scholars will be better able to understand security contracting, its place in military force structure, military operations, and the bigger picture of foreign and defence policy when viewed this way.

The article first critically reviews key arguments in the literature about the drivers of military outsourcing. Next, it lays out its theoretical argument in relation to the existing literature, and then empirically traces the gap between ends and means, how this was attempted to be bridged, and the lasting impacts this has had on military outsourcing and the integration of contractors into military force structure. I conclude with an appraisal of the article's contribution and an outline of avenues for future research.

Reappraising the State of the Art on the Causes of Military Outsourcing

In describing the history and drivers of military outsourcing, the literature focuses on a number of functional, ideational, and military mobilisation-based explanations. On a functional level, several authors agree that worldwide cuts in defence budgets and armed forces after the end of the Cold War released a large number of trained soldiers and officers to an increasingly globalised security market. That market went on to grow exponentially and in tandem with conflict levels, as both the shrunk armed forces around the world as well as international organisations proved unable to contain the emergence of new wars (Singer 2008, pp. 49-60, Avant 2005, pp. 34-38, Krahmann 2010, pp. 9-11.). States struggling to mobilise sufficient forces therefore turned to contractors to fill manpower shortfalls (Cusumano 2015). Additionally, a higher rate of technological change has been found to increase the propensity of contracting out support services because

sophisticated systems require a lot of training, infrastructure, and support, i.e. capabilities that increasingly reside in the market, and additionally because they are non-combat functions (Taylor 2004, pp. 191-193).

The last point leads over directly to a series of ideational and ideological explanations about the place of the private sector in society in general and defence more specifically. In general terms, the more neoliberal modes of governance entrench themselves and the private sector is engaged in the delivery of public services, the more likely private industry is to also provide services to the military (Taylor 2004, pp. 185-186, Abrahamsen and Williams 2011, pp. 59-60. This ties in directly with what Singer called the 'privatization revolution' that strengthened and eventually established pro-outsourcing logics, narratives, and practises in the public sphere (Singer 2008, p. 49, Avant 2005, pp. 32-38.). Based on the assumption that the private sector displays 'high-powered efficiency incentives' that the public sector allegedly lacks, they advocate the move 'from make to buy' (Hartley 2011, pp. 233-235). This is driven not least by buying into the notion that organisations have 'core competencies' that they should focus on while outsourcing all else as far as possible (Taylor 2004, pp. 186-190), driving a 'technologisation' and specialisation of actors that depends on what they do, not who they are (i.e. in uniform or not; Abrahamsen and William 2011, pp. 5-6, Kinsey 2009b). Krahmann and Petersohn thus agree that ideas and norms regarding civil-military, political economic, and military organisation are crucial explanatory variables for the occurrence and variation in military outsourcing (Petersohn 2011, Krahmann 2010). This not least explains why cuts and outsourcing occurred even when threat and conflict levels were high (Krahmann 2010, pp. 72-78).

While convincing in many respects, most of these explanations suffer from a lack of differentiation between different military responsibilities and countries involved, and an over-emphasis on private security and thus the post-Cold War era that obscures decades of relevant preceding history. Also, inadvertently through omission rather than explicitly writing as much, the literature discussed above supports my view that these factors are *not* exclusive to the private security sector but emanate from foreign, defence, and military policy more generally.

First, while indeed hundreds of thousands of former soldiers joined the regular job market after military downsizing, it is questionable whether more than a fraction of them ended up working for the type of global, corporate private security

company attracting the most attention in the literature. [1] The cases cited there certainly do not suggest that suddenly tens, let alone hundreds of thousands of former American, British, German, or Russian soldiers-turned-contractors stepped into the breach and intervened in conflicts in Africa, the Balkans, or elsewhere while states and the UN remained passive. We must thus differentiate between the new corporate 'market for force' which indeed emerged and made headlines (likely due to its novelty, not its size) in some 'new wars', and the old domestic defence-contracting market in 'strong states' which had absorbed huge numbers of former military personnel for many decades and now simply continued doing so while becoming the backbone of several armies as I discuss later (on critical discussion of business-officer relationship see Huntington 1957, pp. 364-366, Ovendale 1994, pp. 14-15).

Secondly, Singer, for instance, is aware of the logistics industry and its significance, but nonetheless focuses his argument on and predominantly deduces his key concerns from corporate combat services, a short-lived phenomenon of the 1990s (Singer 2008, pp. 91-92, 97-100, and 151-229). Krahmann, meanwhile, employs the term private military companies 'rather than referring to particular types of companies or services' as her goal is highlighting the fact that contractors are replacing uniformed personnel and becoming key actors in civil-military relations (Krahmann 2010, p. 8). While this may be admissible given her specific research interest, it remains problematic because not every military function has the same impact, plays the same role, and is thus of equal importance to civil-military relations, military operations, and policy-making. In some cases such undue generalisation leads authors to misconstrue the impacts of outsourcing for instance on civil-military relations, arguing that uniformed personnel are losing their distinctive character because 'their' tasks are now also being provided by contractors and their expertise is thus no longer seen as 'specialist.' However, an army undergoing limited contractualisation is in fact designed to concentrate on combat, a truly exclusive function of regular army personnel. Thus, whereas in the past, uniformed personnel indeed fulfilled a range of tasks mirroring those to be found in the private sector, from engineering to running mess halls, this should now be decreasing, not increasing. Instead, what is becoming normalised or civilianised is the participation of contractors in potentially mission-critical short-of-combat activities (Leander 2006, p. 109).

Kruck took an important step towards alleviating several of these shortcomings by refining existing explanations and developing a sophisticated, nuanced, and parsimonious theory of military outsourcing. He identifies drivers that are specific to military domains, that broadly apply to individual countries, or that apply even more broadly across countries. In brief, ideas explain broader trends across nations, political cost calculations – such as risk transfer from the military to contractors – are more nation-specific, and technical or resource-dependencies best explain the propensity to outsource a specific military capability. Importantly, Kruck's theory applies sequencing to show how and that outsourcing becomes gradually normalised and accepted as a standard practice. This adds a valuable dynamic dimension to the theory and enables more long-term thinking (Kruck 2013, 132-6).

A Missing Piece of the Puzzle: the Interplay between Strategy, Logistics, and the Politics of Defence Economics

While Kruck's theory went a long way towards addressing the issues outlined above, there remains the problem that unlike all other variables strategic posture and culture, defence economics and politics, and their ramifications for outsourcing are viewed as static givens rather than more accurately as historically fluid, contested, and changeable. A theory that accounts for their variability and incremental impact on current and future policy remains wanting. Developing such a theory requires an examination of which resources need mobilising and why, and of how this comes about politically and otherwise. It must also be done in a longitudinal, sequenced manner which views these factors as fundamentally changeable. Importantly, unlike most existing studies, it must extend back long before the end of the Cold War. This matters because the interplay between these factors appears to have been a driving force behind the increasingly systematic resort to contractors and their eventual formal integration into military force structure in the traditionally entrepreneurial USA, which faced specific resource pressures since the 1950s, as well as the UK, which has faced a persistent tension between strategic ends and resources. In line with Kruck's argument this ultimately diffused ideationally and in practice to also shape how other states beyond the USA and the UK man, equip, train, and supply their armies (on diffusion of military

change and defence reform from the USA and UK across NATO see Terriff and Osinga 2010, p. 187).

The argument to be developed in the remainder of this article therefore rests on a series of relationships between key aspects of foreign, defence, and military policy. It departs from a state's strategic defence posture and commitments at a given time. This posture, in turn, is realised according to a particular strategic culture, and in our case this refers particularly to how states envisage fighting war. Together, these two components define the capabilities that are required to realise the commitments and postures in the desired manner, in particular manpower, technology, and training. These capabilities, finally, are generated not least through recruitment and procurement, and therefore hinge on the levels of resources available to the state. It is an historically recurring but not inevitable state of affairs that the available resources appear to fall short of what would ideally be required in order to meet the requirements and thus implement the foreign and defence political objectives with the posture and in the manner desired. And it is also an historically recurring but not inevitable observation that Western industrialised states – certainly the USA and the UK, which this article focuses on – (increasingly and repeatedly) turn to the private sector when seeking to bridge this gap between commitments, requirements, and resources. The remainder of this article shows how and why this has happened to varying degrees.

The Longevity of Strategic Posture and Commitments in the USA and UK, and of their Gap with Available Resources

Global defence postures are defined by two variables: the extent of overseas military presence, and the offensiveness of troops' operational orientation along a spectrum from defence to power projection (Pettyjohn 2012, pp. xii-xiii). The more pronounced these variables are, the more expansive the posture is and the more likely a state is to seek support from the private sector for reaching the necessary levels of deployability and sustainability (Taylor 2004, pp. 190-191). Additionally, a posture's longevity also matters because it can be assumed to stabilise demand for military capability and potentially entrench certain modes of generating capability for the long term. This should apply in particular when a relative lack of resources forces states to rethink how they operationalise their defence strategies, and when

the new mode then works sufficiently well to become the new standard, bureaucratically sanctified process.

Foreign Policy Commitments, or: Expansive Postures

Since the end of the Second World War, the USA and the UK have maintained possibly the most expansive defence postures in the world, with the USA maintaining this outlook to this day and the UK retreating in line with its relative decline in global power but nonetheless seeking the maximum posture it can afford. During the Cold War, an era of comparatively high certainty regarding the geopolitics and likely security threats, deterrence in various guises, certainly along the Central Front in Europe, was the strategic anchor for both (Bacevich 2007a, p. vii). Despite having a history of global military presence since the late 19th century, retaining a large, standing peacetime army was a novelty in the USA, and together with the view that a sustained overseas presence was necessary for national security had taken root among the security leadership (Pettyjohn 2012, pp. xii-xiii, 49, 61). The UK shared this basic understanding, but having to adapt to its changing (relatively declining) global power status while having to address two partly diverging loci – the colonies and the Central Front – it gradually reduced its overseas military presence while increasing its capacities for home-based deployability (Baylis 1986, pp. 19-27, Hartley 1997, p. 19, Croft *et al.* 2001, 38-40). The end of the Cold War saw another expansion of postures by both; the USA as the sole superpower was now virtually unchallenged, while the UK embraced an interventionist posture with the coming-to-power of the Blair government in 1997. This was both partly driven and compounded by the view that ill-defined risks around the world demanded pre-emptive and potentially preventive military responses, with inaction being viewed as potentially riskier than military action (Coker 2002, pp. 27, 33-37, 54). Uncertainty became the key descriptor of official defence policy.

Non-Negotiable Requirements: Military Superiority and Full-Spectrum Capabilities

The USA has to this day maintained the view that military superiority, in particular through technological superiority (J. Gansler, author interview, 23 April 2012), is the key to its global leadership role. Around the end of the Cold War, 'a

new strategic consensus' emerged in both political parties that the USA had to be able to 'fight and win two major theatre wars simultaneously' while also maintaining 'overwhelming … military power to guard against the emergence of a future peer competitor' (Homolar 2011, p. 214, Posen 2003). In the taxonomy of defence postures introduced above, the USA thus embraced one that scores high in both dimensions – an expansive (and, e.g. in Africa, expanding) global military presence that is increasingly geared towards short-notice power projection beyond these bases' immediate surroundings (Pettyjohn 2012, p. 83). It finds expression in every strategic document published in the past decades, regardless of downward pressures on defence spending resulting from the 'Peace Dividend' or the 2008 financial and economic crises. For instance, the 1997 U.S. Quadrennial Defense Review (QDR) rested on the fundamental assumption that the USA 'will maintain military superiority over current and potential rivals' (U.S. Department of Defense 1997, Section II, last paragraph). Then Secretary of Defense William Perry aptly noted that the United States, once in combat, did 'not want a fair fight … but capabilities that will give [it] a decisive advantage.' (Ibid., Secretary's Message) Subsequent QDRs, National Security Strategies (NSS), and strategic guidance documents reiterate this view to this day, containing variations on the themes quoted above (Erbel 2014, pp. 68-72 and 83-86).

The UK, while differing in its acceptance of the need to downscale in line with declining resources, nonetheless seeks to be as globally present and relevant as it can possibly be with the resources available to it (Croft *et al.* 2001). Crucially, at the same time, U.S. and UK defence planning shifted from a threat-based to a capabilities-based approach, affirming the de-territorialisation of strategic and operational outlook (U.S. Department of Defense 2001, p. 4, UK Government 2010, pp. 9-10), and – in the case of the USA – the global scope of its ambitions. The title of the 2012 Strategic Guidance – *Sustaining Global Leadership* – speaks for itself (U.S. Department of Defense 2012). In brief, a retreat from their global position remains 'unthinkable' in the USA even in the face of repeated economic and budgetary crises and some less than satisfactory military outcomes, as its 'imperial' grand strategy of global openness remains firmly in place. In the UK, however, this was 'thinkable', not least because the UK had relatively fewer reserves to tap into than the USA with its disproportionately bigger defence budget. But even the UK only cut as little and as late as possible to maintain the most

expansive posture it could afford, pursuing the role of 'residual great power' at the behest of the USA (cf. McCourt 2014).[1]

Resources: Constantly High Demands for Capability and Manpower

Over the course of the decades this has led to a constantly high demand for military capability in diverse theatres of operation, not least due to an 'unintentional militarism' in the USA as a result of which the military is often the first foreign policy tool drawn upon in a crisis (cf. Downes 2010). As noted, that capability requirement is one of full-spectrum dominance in the USA and leadership in the UK (U.S. Department of Defense 2012, p.6, UK Army 2012, p. 3). It centres on technological superiority across the spectrum of capabilities, illustrative of especially the USA's long-held belief 'in the virtue of technology as a solution for myriad tactical and strategic problems' (Lake 2012, p. 77), and concomitantly the fact that U.S. grand strategy since World War II was built around technological superiority (J. Gansler, author interview, 23 April 2012).[2] The UK government, similarly, recognises the centrality of technology (UK Ministry of Defence 2012), and has consistently opted for hi-tech equipment rather than sizeable armed forces when faced with budget crises (McIntosh 1990, pp. 26-30). Adding to this breadth is the requested ability to project these capabilities anywhere in the world at short notice, making '[overseas] projection capability is a critical element of … post-Cold War military strategy' (Mears and Kim 1994, p. 40). As a result, not only do training requirements for soldiers rise on the one hand, as they have to learn to use (and sometimes maintain) new, more technologically complex systems, but also, on the other hand, the need for non-combat support services with the high sophistication of equipment and the growing transportation and global sustainment needs.

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[1] It is beyond the remit of this article to explore the causes of strategic longevity and its trajectory in depth. It should however be noted that, in addition to the 'imperial' grand strategy, the reticence to substantially alter course is also grounded in the political incentive structure of both states that is geared towards continuity, not change. This is examined in detail in Erbel 2014, pp. 72-89.

[2] Gansler is, among others, former Under Secretary of Defense for Acquisition.

A Persistent Gap: Commitments vs. Capabilities and Resources

There has been a strong tension between these strategic commitments and the concomitant high technological capability requirements on the one hand, and military force structure, manpower resources, and budgets on the other since the early days of the Cold War. High defence inflation meant that unit prices for military hardware rose at a real annual rate of approximately 10 percent in the UK, leading the country to shed self-sufficiency in military research, development, and production and embrace international defence procurement and partnering (Croft *et al.* p. 115). The USA, meanwhile, despite reducing manpower by 600,000 in the mid-1950s, increased defence spending by 20 percent from 1954 to 1959 to fund new air and missile systems as part their of nuclear and general deterrence strategy. As in the UK, the high rate of technological change made new systems rapidly obsolete, meaning that personnel costs for training remained very high while the percentage of support personnel as part of the total force rapidly grew (Stewart 2005, p. 258). These pressures persisted throughout the Cold War and increased after its end when the 'Peace Dividend' led to reduced troop levels, the 'Revolution in Military Affairs' maintained the pressure to keep abreast of new technologies, and the number of military deployments grew. As a result, a smaller 'force [had to] support increased power projection requirements' (Mears and Kim 1994, p. 39), a condition that persists to this day. It should be noted here, and will be shown in more detail below, that the vast majority of personnel this refers to, including those whom the armed forces struggled to recruit and retain at sufficient levels, were not combat but combat support and combat service support troops; they were not those soldiers and officers providing the types of services that were later acquired from companies such as Blackwater.

Bridging the Gap: Core Competency, Peacetime Budgeting, and Turning to the Private Sector

Even though the gap was a constant feature, even repeated massive budgetary pressures and economic crises did not lead to a narrowing of either the strategic commitments or the technological requirements. The baseline remained unchanged: missions must be successfully implemented anywhere in the world, fielding the most advanced equipment and deploying the world's best-trained

troops, even when access to the operational theatre is heavily contested. Instead, both the U.S. and UK governments sought to improve efficiency across the defence enterprise, almost always by adopting ideas, concepts, and practices tied to the alleged virtues of private enterprise. This took the form of streamlining military force structure, centralising defence management, introducing 'managerialism' into defence policy, organisation, and management, and later adopting wholesale 'best business' or 'best commercial practices'. Ultimately, from approximately 1980 onwards, this caused a significant increase in military outsourcing for overseas deployments in the wake of which contractors rapidly became indispensable. It is important to note that none of this was inevitable (or, for that matter, even necessarily the product of a deliberate, long-term, rational decision-making process; Novak 2009, pp. 24-25), despite the oft-repeated variations on the theme that 'there is no alternative'. Instead, the defence enterprise's trajectory since the 1950s that has seen it (seek to) inch ever closer to resembling a private sector organisation is deeply embedded in wider, at least initially contested processes of politico-economic change in the course of which states shrunk from welfare states to market-states (case study of Sweden in Berndtsson 2014).

Laying the Foundations of the 'Market-State' in Defence[3]

Centralising defence management occurred in several waves and resulted in single ministries of defence that became the focal points of policy formulation and implementation and were closely tied to the central government, the military, and the defence-industrial base (Broadbent 1988, pp. 4-12). The armed services incrementally lost their own ministries and many prerogatives in force structure, research and development, and acquisition policy that were increasingly bundled in cross-service agencies such as the Defense Supply Agency in 1961 in the USA (now the Defense Logistics Agency) (Stewart 2005, pp. 202-203, 258-259, 273-274, see also McIntosh 1990, pp. 20-21). The relative loss of influence may have contributed to outsourcing insofar as the military's ability to veto certain policies was degraded. For instance, the U.S. Army in the 1970s had refused to outsource welfare and other services, seeking to 'take care of its own' and remain a self-

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[3] See the eponymous chapter in Bobbitt 2003, pp. 213-242, for the possibly first academic use of the term 'market-state'.

sufficient all-volunteer force (Mittelstadt 2013). By the 1980s, however, it had to acquiesce to the rapid expansion of outsourcing and the gradual shrinking of military-only service provision.

The abolition of conscription signalled the entry of the army into the labour market where it had to compete with other employers for employees. In fact, the rationale for introducing an all-volunteer force contained at their core several of the key assumptions and arguments put forward by outsourcing advocates: organisations have core competencies (with the army's being combat which explains why the U.S. Army shifted most of its support provision to the Reserves in the 1970s) (Stewart 2005, 388), and it is thus uneconomical and bad business practice to employ trained soldiers for non-combat, non-inherently governmental, core military tasks. The shifting of capability to the reserves had another effect that is particular to countries that pay for war in the way that the USA and the UK do. Defence budgets in both countries are appropriated for peacetime expenses, while the costs of war and other overseas contingencies are covered through supplementary budgets (USA) or the Treasury's Reserve fund (UK). The outsourcing of many of these support functions from the 1980s onwards – importantly, including for overseas operations – was the logical conclusion of a budgeting tactics that sought to maintain the level of military commitments while reducing the 'base budget'. Put differently, decision-makers could have their cake – maintain an expansive, currently unaffordable grand strategy and defence posture – while eating it too – cutting the main defence budget. This works regardless of how rare or short-term 'contingency' operations in fact are, and appears to have made a critical reappraisal of the feasibility and appropriateness of an expansive global defence posture less likely to happen.

These force structure changes also abided by another logic that became ever more deeply entrenched in defence (and also far beyond): core competency. This, in turn, was part of a larger parcel of reforms through which governments sought to emulate market practices. This process of incremental reform of the defence enterprise, again, took its beginning long before the USA and UK began outsourcing security functions. It is commonly seen to have begun in earnest under U.S. Secretary of Defense Robert McNamara, the beginning of the era of the 'whiz kids,' but his policies fell on fertile ground prepared decades before when the second Hoover Commission advocated for the introduction of private sector

methods in defence after the Second World War (Hewes 1975, p. 291). Having a long history in the private sector and previously worked as assistant professor at Harvard Business School, it is unsurprising that his reforms of DoD's organisation and processes drew on 'the latest management techniques and computer systems' with the aim of reducing overlap and increasing efficiency. This included the application of a technical approach to problem-solving that contributed to the gradual separation of the armed forces by function rather than Service, and formed part of the centralised unification of functions, e.g. in the Defense Supply Agency (Stewart 2005, pp. 273-274). It also meant functionalising defence as an 'output of policy-making' that was 'susceptible to standard economic analysis' (Ibid.), which is exactly that way that outsourcing would conceptualise defence, without regard for Service mentalities or other non-material considerations (Hartley 2011, pp. 19-24). At the time, savings were mostly sought from the marketplace in the procurement of equipment, as the noted rapidly rising unit costs represented a significant challenge whereas conscription at the time meant that services remained more affordable. Nonetheless, the ideational basis for service contracting had been laid and became incrementally institutionalised in DoD in the following decades (Stewart 2005, pp. 274-276).

The UK followed suit in 1964, when it introduced the 'Planning-Programming-Budgeting System (PPBS)' that also bureaucratised defence decision-making and pushed for a functionalisation of defence organisation by task rather than Armed Service (Edmonds 1986a, p. 9). Following the Fulton Report it also formalised defence contracting in 1968 by creating the Review Board for Government Contracts, and even pondered (though did not introduce) a formalised 'revolving door' to transfer defence personnel between the public and private sectors (Croft *et al.* 2001, p. 92). The recommendation, even if not implemented, and the broader reforms clearly illustrate the status, hopes, and weight assigned to the defence-industrial base in Britain as the source of rectifying the imbalance between commitments and resources. This belief was reiterated throughout the following decades, so much so that by 1992 the then Chief of Defence Procurement Malcolm McIntosh stated that he 'was encouraged in a recent discussion with the [Confederation of British Industry] experts on partnership to learn that' the MoD's Procurement Executive often applied, as appropriate, 'many of the techniques they advocate.' (McIntosh 1992, p. 73)

The ideational foundations of managerialism and the belief in entrepreneurial superiority became increasingly unquestioned and came to gradually encompass military service provision. This happened most forcefully from 1979 onwards when the governments of both the UK and the USA pursued defence reform no longer by focusing predominantly on the procurement of equipment but also on the provision of military services both at home and overseas. The government of UK Prime Minister Thatcher sought to reduce equipment costs by privatising a number of state-owned defence enterprises, placing them in competition, and giving industry more leeway in how to achieve targets rather than micromanaging industry's activities (Croft *et al.* 2001, pp. 172-178). The end of public ownership of defence industries can be read as a strong vote of confidence in the alleged superiority of private over state enterprise. It was accompanied by further managerial reforms and the introduction of, for instance, a New Management Strategy, the devolution of budgetary responsibility to the 'consumers' in the MoD through the Defence Agency programme, and the public tender of contracts instead of procuring goods and services from trusted sellers. Taken together, these reforms strengthened the foundations that made the outsourcing of support services a standard procedure rather than an *ad hoc* activity, and thus heralded the growing role of the private sector in providing military services (Croft *et al.* 2001, pp. 93-95, 121-126, Thorn 1986, p. 61). As Matthew Uttley observes, the 'broad program of UK defense management reforms since the 1980s appears to have created structures, a 'corporate culture' and organizational incentives for MOD officials at all levels to evaluate the scope for private sector involvement across the defense support sector.'(Uttley 2005, pp. 29-30) By 2001, 'Value for Money', 'Best Practices', 'Smart Acquisition', and 'Teamwork with Industry' had become cornerstones of British defence acquisition policy and practice, turning the government from an owner into a customer and hopefully 'smart buyer' who micromanages less and enables industry more (UK Ministry of Defence 2001).

While the USA had always drawn on contractors for some of its military's support requirements, it was only in the 1980s that it gradually began to formally and systematically outsource the provision of support services in overseas theatres of operation rather than do so *ad hoc*. The Logistics Civil Augmentation Program (LOGCAP), one of the largest and longest-running contract vehicles of the U.S.

military, was created through federal legislation in 1985 (U.S. Army 1985). Around the same time, similar to the UK, the U.S. Army's 'Total Quality Management' and 'Total Army Quality' programmes sought to institute a customer mind set in the Service at a time of cuts in the logistics domain (Mittelstadt 2013). Throughout those decades, a plethora of public and private initiatives set about entrenching the self-perception of the state as a customer of private services. Be it through lobbying and networking efforts by industry groups such as the Professional Services Council and Business Executives for National Security, task groups of the various defence boards to implement a 'culture of savings' through behavioural change in DoD that emulates the private sector, or the statutory obligation of DoD to follow 'smart acquisition' mandates passed in various National Defense Authorization Acts (U.S. Department of Defense 2011, U.S. Congress 2013, Section 823, and on politics of military outsourcing see Erbel 2016)– managerialism, small government, the 'new public management', and a preference for private enterprise became ever more deeply institutionalised in both the U.S. and UK defence policy domains.

Deliberate, but not Inevitable: Continuing on Paths Well-Trodden

It bears repeating that all these developments well pre-date the outsourcing of security-related functions to incorporated companies that started in earnest after 9/11, and that all of these initiatives and reforms sought efficiencies at the 'tail end' of the army, i.e. the support end comprising areas such as logistics, operation and maintenance of equipment, and feeding of troops. The processes outlined above over the course of at least three decades laid the foundations of the status quo in which managerialism and far-reaching contractualisation are all but unquestioned in the USA and the UK. These foundations, however, were sometimes more ideational than operationalised on the ground; tentative, and disputed. It was therefore only in the 1990s, when governments led by the previous opposition parties confirmed and in fact accelerated the previous policy trajectory, that the current status quo became firmly established. Only in the 1990s was the remoulding of defence in the image of business transformed from a partly implemented idea and a policy *proposition* into an institution and policy *standard*. At the critical juncture that emerged with the end of the Cold War, the disappearance of the Soviet Bloc, and the significant reductions across the armed

forces (the 'Peace Dividend'), the USA and the UK did not think about bridging the persistent gap between commitments and resources – which became even more pressing as the number of military operations grew rather than shrank in the 1990s – by significantly retreating from the world stage, reducing their commitment to cutting-edge military technology, or increasing the number of recruits. Instead, with the victory of capitalism and liberalism, they invested wholesale into the core competency model and continued to bolster their national defence industries by increasing the mutual dependency between state and industry that made a reversal more difficult by the day. Put differently, while the stage had been set over the past decades, the most recent developments after the Cold War were not an historical necessity but instead resulted from deliberate decisions to continue on a trajectory that entailed further investment in the belief that business could produce and provide services more efficiently and flexibly than government (even though no systematic evidence had been available at the time) (Avant 2005, p. 32, Novak 2009, pp. 24-25). The rapid growth of security contracting falls into this specific period of time with its particular political and economic context.

In the USA, the consolidation of the defence industry after 1990 meant that a shrinking number of large companies became even more heavily dependent on U.S. government procurement than in the past. Since the defence-industrial base in the USA is viewed as a producer of security, challenges to its industry are thus challenges to its national security. This prompts the U.S. government to invest more effort into ensuring its national defence industry's survival and sustaining its inflow of business (U.S. Department of Defense 2010b). The Commission on Roles and Missions of the Armed Forces (CORM) was set up in 1994, and – like many previous efforts at reforming U.S. defence spending and improving efficiency – recommended reducing 'the cost of the support infrastructure through increased outsourcing and better management' (U.S. Department of Defense 1995, pp. 2-3 of the Executive Summary). The CORM was not very amenable to asking whether or not outsourcing was a good decision *per se*, but appeared to have received the 'marching orders—outsource!' (F. Camm, personal correspondence, 5 September 2012).[4] The CORM's strong endorsement of contractualisation is deeply steeped in

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[4] Camm is a Senior Economist at the RAND Corporation and was involved in the wider CORM process.

the notion of core-competency, urging DoD to 'concentrate service efforts on military core competencies' (U.S. Department of Defense 1995, Chapter 2, p. 20). Subsequent high-policy document picked up and formalised this interpretation of military force structure, with the Secretary of Defense noting in the 1997 QDR that in order '[to] preserve combat capability and readiness, the Services have targeted the reductions by streamlining infrastructure and outsourcing non-military-essential functions.' (U.S. Department of Defense 1997, Secretary's Message) The 2010 QDR still had to contend with the same force structure problems, seeking to come up with the appropriate mix for the defence workforce that now formally comprises military, civilian, and contractor personnel (U.S. Department of Defense 2010a, p. 55).

The UK, similarly, focused its defence reform efforts on improving its 'tooth-to-tail' ratio, that is the relative firepower of its uniformed troops, by prioritising spending on combat forces and their equipment while shifting support and technological tasks to the private sector. This trend, epitomised in the dictum of the eponymous report 'Front Line First' of 1994, took the form of public-private partnerships and 'Private Finance Initiatives' as ways towards core competency (Laurent 1991, p. 88, Krahmann 2010, pp. 237-248, Hartley 1997, pp. 21-22, Croft *et al.* 2001, p. 22).

Each of these initiatives makes unmistakably clear that the unwavering demands for technological superiority and global military dominance (USA) or leadership (UK) underpinned the developments above. An oft-cited DSB report in 1996, 'chartered to develop recommendations on ways DOD could use outsourcing as an important tool to free up substantial funds to support defense modernization needs', advised the government *to contract out 'all DoD support functions … except those … which are inherently governmental, are directly involved in warfighting, or for which no adequate private sector capability exists or can be expected to be established.'* (U.S. Department of Defense 1996, Accompanying Memo, emphasis added) Had either state been willing to proceed with less sophisticated equipment or a significantly less expansive posture, their defence establishments may not have been compelled to go down the route of core competency, knowledge transfer out of the military, the strong investment in new military vogues such as the 'Revolution in Military Affairs', and the concomitantly increasing outsourcing. Instead, the charter's formulation makes clear that core

competency and further privatisation were now the point of departure for future defence reform, no longer merely an option among others. Both the USA and the UK went on to increasingly contract out the support of their equipment to the original manufacturer or other industry providers throughout a system's life-cycle through vehicles such as 'performance-based logistics' that – in the USA – are now mandated by law to be applied (U.S. Congress 2013, Section 823) The UK, meanwhile, even goes so far as to buy an asset's capability (e.g. hours of air-to-air refuelling capability) rather than buy the asset outright (e.g. an air-to-air refuelling aircraft) (see e.g. UK Royal Air Force). Both states, moreover, are exploring (the USA) or implementing (the UK) new military force structures which have one theme in common – the support end of every future military deployment will comprise a sizeable number of private contractors.[5]

Importantly, the CORM merely mentions 'base security', i.e. static protection of military installations, as an area in which outsourcing could be expanded in the future (U.S. Department of Defense 1995, Chapter 3, p. 2), and the DSB report makes no mention of security contracting at all in its discussion of dozens of areas that are being outsourced already or should be considered for contractualisation (U.S. Department of Defense 1996, pp. 58-64). Instead, it is the support service sector that is repeatedly highlighted as providing the largest potential for savings and fresh expertise (for the government) and profit opportunities (for the private sector). It is also sufficiently non-inherently governmental as far as the use of violence is concerned. It was therefore the most attractive target during the outsourcing initiatives of the 1990s, as it engendered least resistance and ran into the fewest obstacles.

Nonetheless, these reports also fall into the time in which some seminal works on private security locate the emergence of the 'market for force' and the 'privatized military industry' as distinct objects of study, and so this point warrants further consideration (cf. Avant 2005, Singer 2008). Formerly suppressed conflicts erupted after the end of the Cold War and states turned to the new, globalising market in order to enhance their military capabilities. Some security contractors in the 1990s provided quasi-mercenary services in Africa and have now mostly

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[5] These are the Joint Logistics Enterprise in the USA and the Total Support Force in the UK, see U.S. Department of Defense 2010c, and UK Ministry of Defence 2010.

disappeared or retreated into the shadows, while other companies were hired to provide training and capacity-building for weak states' armies and stuck around. These events accord with my view that a gap between ends and means within a certain strategic and political-economic context drives the contractualisation of military services; in this case, a security market had become available (in an era of military downsizing, accelerated globalisation, and sweeping privatisation) to states affected by civil war. Moreover, most of these cases did not involve the USA, UK, or other Western states, and when they did, for instance MPRI's oft-cited advising contract in Croatia, contractors were hired for non-combat tasks and to circumvent political obstacles that prevented uniformed U.S. personnel from providing the service in question (a strategic gap of sorts not unlike that sometimes faced during the Cold War that lead to the use of mercenaries in the past).[6]

The larger-scale recourse to private *security* contractors by the USA and UK only truly came about after 9/11. The outsourcing of all non-inherently governmental, non-core competencies and functions – as a matter of *principle* – had been absorbed by the political mainstream, and the catastrophically understaffed wars in Afghanistan and Iraq had recreated, on the operational level, the now-familiar gap between ends and means, including in the security sphere. Not least due to political and capability restraints, especially manpower caps, it was sought to be overcome yet again by outsourcing, in this case through the deployment of an unprecedented number of contractors into active warzones where they for many years outnumbered uniformed personnel. But even then and there, *security* contractors always were and remain only a small minority of the overall contractor workforce on the ground, and are included alongside other contractors in overall manpower counts (on Iraq see Kinsey 2009a, for statistics see Schwartz and Swain 2011, pp. 7, 10, 13, 15, 24, and Peters *et al.* 2015).

Viewed from this angle, private *security* contractors – certainly in the West – appear as yet another attempt at bridging the gap between ends and means,

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[6] For more on such use of military contractors, see Mohlin 2012. While bearing some similarities with the use of mercenaries and combat-prone 'advisors' during the Cold War, especially the circumvention of political opposition to interference in civil wars as well as ensuring 'plausible deniability' of any involvement, companies such as MPRI and the training and advisory services they provide fall into a significantly different category than the mercenarism of the past, not least their legal status and contractual relationships, but also the nature of their employees and their non-participation in offensive combat operations. On the use of mercenaries and 'advisors' during the Cold War, see Voß 2016.

broadly in line with the many other examples discussed in this article. Their rise came about somewhat haphazardly, not least due to the unexpected collision of defence budget cuts and increases in global military activity – i.e. an exacerbation of the ends-means-gap – which met a political environment that advocated and even mandated the maximum shrinking of the public sector (not least by outsourcing as many functions as possible), and that coincided with the rapid expansion of the global trade in services. Put differently, the underlying drivers of *security* contracting did not differ fundamentally from the structural dynamics that drove the piecemeal process towards contractualisation in the USA and UK since the 1950s.[7] The resulting problems and challenges associated with non-state use of force – regulation, oversight, and accountability – may well differ, but not enough to warrant the singularity awarded to private security contracting as a whole. Instead, security contractors should be viewed as forming a part of the total force package that combines regular troops and contractors on deployments, or as occasionally serving as proxies when regular troops cannot deploy but there is political determination to influence events on the ground. Viewing security contracting from this angle enables us to both more fully and nuancedly appreciate the reasons for and rationale behind their recruitment, their place in military force structure and operations, as well as the particular challenges they pose for public policy and administration. Importantly, it enables a comparative examination that much more fully understands not only the differences but also the commonalities behind states' recourse to the full range of military service providers. As such, therefore, the factors laid out in this paper explain both the early recourse to private contractors as well as the creation and structure of an environment in which eventually even protective security tasks – alongside a wide range of other military responsibilities – were gradually outsourced by formerly militarily self-sufficient states to private contractors.

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[7] The resort to security contractors elsewhere is less clear cut as it spans the range from quasi-mercenarism to the neoliberal purchase of capability on the more regulated, international market. See Dunigan and Petersohn, eds, 2015, for a more systematic breakdown of the emergence and typology of markets for force in the world.

Conclusion and Outlook

This article set out to make two main points. First, a state's strategic posture can be conceptualised as part of a deep, underlying layer of drivers of military outsourcing. Depending on its interplay with ideational factors, such as the proclivity for neoliberal political economics, strategic culture and the conduct of war, and the need to subsidise a domestic defence-industrial base, it can accelerate or decelerate the emergence of and the turn to private military service providers. Secondly, the article sought to rectify the persistent but unconvincing approach of the literature that seeks to generalise about the wider phenomenon of military outsourcing by basing itself on the private *security* sector. As was shown, not only the ideational basis for outsourcing but also the first (and the largest) contract vehicles were located in the logistics area. This was already at the height of the Cold War when outsourcing security was not even near the political agenda. The expanded outsourcing of security after the Cold War came at a time when the combined forces of uncertainty in the security environment, defence cuts, and the global sweep of the privatisation paradigm yet again exacerbated the gap between ends and means, and met with a political and economic environment in which for many years there had been advocacy and government reform aimed at outsourcing – by default – all non-inherently governmental functions. The end of the Cold War, then, did not spark wide-spread military contracting, but instead merely represented the beginning of the latest stage of a much longer process that had set in in the very early days of the Cold War. This stage was defined by the doubling-down on the driving forces which, at its peak, swept up the security domain in the understaffed wars in Iraq and Afghanistan. It is certainly reasonable to assume that governments would have been more hesitant to outsource responsibilities that potentially involve the use of force had they not had several decades of experience in gradually relying more and more on the private sector for the implementation of their defence policies, and had they not been both externally lobbied and internally working to shrink the government to perform only inherently governmental functions and focus on core competencies.

We can therefore better understand both the occurrence, significance, and scale of military outsourcing when placed in this wider historical and conceptual context. Security contracting more specifically then appears less like an entirely

'new beast' and instead more like yet another subset of contracting for military capability as has been done for decades in various other domains. Moreover, by appreciating the significance of foreign policy, defence postures, strategic cultures, and the political economy for military outsourcing, we can move forward two debates. First, the debate about the causes, appropriateness, and future trajectory of military outsourcing can take a much more holistic perspective when it is aware of the full range of relevant factors behind the phenomenon, as can the debate about making foreign and defence policy in the current climate of strategic uncertainty, rapid technological change, and economic instability. For instance, for those wishing to curtail the practice, simply passing a memo that seeks to propel government agencies to insource functions that currently reside in the private sector – as was done in the USA in 2009 and rescinded in 2010 – is unlikely to do the trick (U.S. Department of Defense 2009). What is required instead is a more holistic awareness that understands that outsourcing is not the root political issue but a consequence of the state's desire to draw on a relatively self-sufficient defence-industrial base, to maintain military and technological superiority and dominance, and the ostensible need to maintain a global, forward-leaning posture. Second, the same applies to another area of study that for reasons of space was not addressed here but that deserves attention, namely the politics of military service contracting. Ideas such as national roles (e.g. superpower, great power), superiority of private enterprise, core competency and so on do not operate on their own, but are embraced by policy entrepreneurs, policy-makers, and bureaucrats (among others) and repeatedly operationalised in the policy process. How this is done and – more importantly – sustained over decades to create the status quo (which has been shown to be not inevitable but historically contingent) represents yet another piece of the puzzle that has received minimal attention in the past decade and a half when research into the 'privatisation of security' took off (Erbel 2014).

Future research should therefore consider branching out in two directions. First, as was done in this paper, it ought to expand the range of contractualised military responsibilities beyond security, and, secondly, go beyond Western states when studying the phenomenon of military outsourcing. These steps enable us to build both a more comprehensive, variable, and thus generally applicable understanding of the practice, and to test our assumptions about the relationship between state, their posture, strategic culture, political economy, and defence

economics on one hand, and military outsourcing on the other (recent examples are Dunigan and Petersohn, eds, 2015, Berndtsson 2014). Future research could then either approximate a more universal theory of military outsourcing or, alternatively, geographically and/or empirically further specify and delimit existing explanations und understandings. Such efforts promise to remain timely: With budgetary pressures persisting, technology advancing, and foreign policy objectives remaining global and ambitious, the debate about how states can achieve their international objectives will equally endure. I hope to have shown that neither the pressures nor the (foundations of) many of the responses to them are as new as they might at times appear, but that they have in fact been surprisingly stable features since the beginning of the Cold War.

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