By George Friedman

U.S. President Barack Obama announced the broad structure of his Afghanistan strategy in a speech at West Point on Tuesday evening. The strategy had three core elements. First, he intends to maintain pressure on al Qaeda on the Afghan-Pakistani border and in other regions of the world. Second, he intends to blunt the Taliban offensive by sending an additional 30,000 American troops to Afghanistan, along with an unspecified number of NATO troops he hopes will join them. Third, he will use the space created by the counteroffensive against the Taliban and the resulting security in some regions of Afghanistan to train and build Afghan military forces and civilian structures to assume responsibility after the United States withdraws. Obama added that the U.S. withdrawal will begin in July 2011, but provided neither information on the magnitude of the withdrawal nor the date when the withdrawal would conclude. He made it clear that these will depend on the situation on the ground, adding that the U.S. commitment is finite.

In understanding this strategy, we must begin with an obvious but unstated point: The extra forces that will be deployed to Afghanistan are not expected to defeat the Taliban. Instead, their mission is to reverse the momentum of previous years and to create the circumstances under which an Afghan force can take over the mission. The U.S. presence is therefore a stopgap measure, not the ultimate solution.

The ultimate solution is training an Afghan force to engage the Taliban over the long haul, undermining support for the Taliban, and dealing with al Qaeda forces along the Pakistani border and in the rest of Afghanistan. If the United States withdraws all of its forces as Obama intends, the Afghan military would have to assume all of these missions. Therefore, we must consider the condition of the Afghan military to evaluate the strategy's viability.

Afghanistan vs. Vietnam

Obama went to great pains to distinguish Afghanistan from Vietnam, and there are indeed many differences. The core strategy adopted by Richard Nixon (not Lyndon Johnson) in Vietnam, called "Vietnamization," saw U.S. forces working to blunt and disrupt the main North Vietnamese forces while the Army of the Republic of Vietnam (ARVN) would be trained, motivated and deployed to replace U.S. forces to be systematically withdrawn from Vietnam. The equivalent of the Afghan surge was the U.S. attack on North Vietnamese Army (NVA) bases in Cambodia and offensives in northern South Vietnam designed to disrupt NVA command and control and logistics and forestall a major offensive by the NVA. Troops were in fact removed in parallel with the Cambodian offensives.

Nixon faced two points Obama now faces. First, the United States could not provide security for South Vietnam indefinitely. Second, the South Vietnamese would have to provide security for themselves. The role of the United States was to create the conditions under which the ARVN would become an effective fighting force; the impending U.S. withdrawal was intended to increase the pressure on the Vietnamese government to reform and on the ARVN to fight.

Many have argued that the core weakness of the strategy was that the ARVN was not motivated to fight. This was certainly true in some cases, but the idea that the South Vietnamese were generally sympathetic to the Communists is untrue. Some were, but many weren't, as shown by the minimal refugee movement into NVA-held territory or into North Vietnam itself contrasted with the substantial refugee movement into U.S./ARVN-held territory and away from NVA forces. The patterns of refugee movement are, we think, highly indicative of true sentiment.

Certainly, there were mixed sentiments, but the failure of the ARVN was not primarily due to hostility or even lack of motivation. Instead, it was due to a problem that must be addressed and overcome if the Afghanistation war is to succeed. That problem is understanding the role that Communist sympathizers and agents played in the formation of the ARVN.

By the time the ARVN expanded — and for that matter from its very foundation — the North Vietnamese intelligence services had created a systematic program for inserting operatives and recruiting sympathizers at every level of the ARVN, from senior staff and command positions down to the squad level. The exploitation of these assets was not random nor merely intended to undermine moral. Instead, it provided the NVA with strategic, operational and tactical intelligence on ARVN operations, and when ARVN and U.S. forces operated together, on U.S. efforts as well.

In any insurgency, the key for insurgent victory is avoiding battles on the enemy's terms and initiating combat only on the insurgents' terms. The NVA was a light infantry force. The ARVN — and the U.S. Army on which it was modeled — was a much heavier, combined-arms force. In any encounter between the NVA and its enemies the NVA would lose unless the encounter was at the time and place of the NVA's choosing. ARVN and U.S. forces had a tremendous advantage in firepower and sheer weight. But they had a significant weakness: The weight they bought to bear meant they were less agile. The NVA had a tremendous weakness. Caught by surprise, it would be defeated. And it had a great advantage: Its intelligence network inside the ARVN generally kept it from being surprised. It also revealed weakness in its enemies' deployment, allowing it to initiate successful offensives.

All war is about intelligence, but nowhere is this truer than in counterinsurgency and guerrilla war, where invisibility to the enemy and maintaining the initiative in all engagements is key. Only clear intelligence on the enemy's capability gives this initiative to an insurgent, and only denying intelligence to the enemy — or knowing what the enemy knows and intends — preserves the insurgent force.

The construction of an Afghan military is an obvious opportunity for Taliban operatives and sympathizers to be inserted into the force. As in Vietnam, such operatives and sympathizers are not readily distinguishable from loyal soldiers; ideology is not something easy to discern. With these operatives in place, the Taliban will know of and avoid Afghan army forces and will identify Afghan army weaknesses. Knowing that the Americans are withdrawing as the NVA did in Vietnam means the rational strategy of the Taliban is to reduce operational tempo, allow the withdrawal to proceed, and then take advantage of superior intelligence and the ability to disrupt the Afghan forces internally to launch the Taliban offensives.

The Western solution is not to prevent Taliban sympathizers from penetrating the Afghan army. Rather, the solution is penetrating the Taliban. In Vietnam, the United States used signals intelligence extensively. The NVA came to understand this and minimized radio communications, accepting inefficient central command and control in return for operational security. The solution to this problem lay in placing South Vietnamese into the NVA. There were many cases in which this worked, but on balance, the NVA had a huge advantage in the length of time it had spent penetrating the ARVN versus U.S. and ARVN counteractions. The intelligence war on the whole went to the North Vietnamese. The United States won almost all engagements, but the NVA made certain that it avoided most engagements until it was ready.

In the case of Afghanistan, the United States has far more sophisticated intelligence-gathering tools than it did in Vietnam. Nevertheless, the basic principle remains: An intelligence tool can be understood, taken into account and evaded. By contrast, deep penetration on multiple levels by human intelligence cannot be avoided.

Pakistan's Role

Obama mentioned Pakistan's critical role. Clearly, he understands the lessons of Vietnam regarding sanctuary, and so he made it clear that he expects Pakistan to engage and destroy Taliban forces on its territory and to deny Afghan Taliban supplies, replacements and refuge. He cited the Swat and South Waziristan offensives as examples of the Pakistanis' growing effectiveness. While this is a significant piece of his strategy, the Pakistanis must play another role with regard to intelligence.

The heart of Obama's strategy lies not in the surge, but rather in turning the war over to the Afghans. As in Vietnam, any simplistic model of loyalties doesn't work. There are Afghans sufficiently motivated to form the core of an effective army. As in Vietnam, the problem is that this army will contain large numbers of Taliban sympathizers; there is no way to prevent this. The Taliban is not stupid: It has and will continue to move its people into as many key positions as possible.

The challenge lies in leveling the playing field by inserting operatives into the Taliban. Since the Afghan intelligence services are inherently insecure, they can't carry out such missions. American personnel bring technical intelligence to bear, but that does not compensate for human intelligence. The only entity that could conceivably penetrate the Taliban and remain secure is the Pakistani Inter-Services Intelligence (ISI). This would give the Americans and Afghans knowledge of Taliban plans and deployments. This would diminish the ability of the Taliban to evade attacks, and although penetrated as well, the Afghan army would enjoy a chance ARVN never had.

But only the ISI could do this, and thinking of the ISI as secure is hard to do from a historical point of view. The ISI worked closely with the Taliban during the Afghan civil war that brought it to power and afterwards, and the ISI had many Taliban sympathizers. The ISI underwent significant purging and restructuring to eliminate these elements over recent years, but no one knows how successful these efforts were.

The ISI remains the center of gravity of the entire problem. If the war is about creating an Afghan army, and if we accept that the Taliban will penetrate this army heavily no matter what, then the only counter is to penetrate the Taliban equally. Without that, Obama's entire strategy fails as Nixon's did.

In his talk, Obama quite properly avoided discussing the intelligence aspect of the war. He clearly cannot ignore the problem we have laid out, but neither can he simply count on the ISI. He does not need the entire ISI for this mission, however. He needs a carved out portion — compartmentalized and invisible to the greatest possible extent — to recruit and insert operatives into the Taliban and to create and manage communication networks so as to render the Taliban transparent. Given Taliban successes of late, it isn't clear whether he has this intelligence capability. Either way, we would have to assume that some Pakistani solution to the Taliban intelligence issue has been discussed (and such a solution must be Pakistani for ethnic and linguistic reasons).

Every war has its center of gravity, and Obama has made clear that the center of gravity of this war will be the Afghan military's ability to replace the Americans in a very few years. If that is the center of gravity, and if maintaining security against Taliban penetration is impossible, then the single most important enabler to Obama's strategy would seem to be the ability to make the Taliban transparent.

Therefore, Pakistan is important not only as the Cambodia of this war, the place where insurgents go to regroup and resupply, but also as a key element of the solution to the intelligence war. It is all about Pakistan. And that makes Obama's plan difficult to execute. It is far easier to write these words than to execute a plan based on them. But to the extent Obama is serious about the Afghan army taking over, he and his team have had to think about how to do this.