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## VOJAŠKO ŠTUDIJSKO POTOVANJE V POKLICNEM VOJAŠKEM IZOBRAŽEVANJU: ZDRUŽITEV ZGODOVINE, SODOBNEGA BOJIŠČA IN BOJIŠČA PRIHODNOSTI

## STAFF RIDES IN PROFESSIONAL MILITARY EDUCATION: FUSING HISTORY, THE MODERN BATTLEFIELD, AND THE BATTLEFIELD OF THE FUTURE

**Povzetek** Članek preučuje ključno vlogo vojaških študijskih potovanj v poklicnem vojaškem izobraževanju in izpostavlja njihovo sposobnost povezovanja zgodovinskih vojaških dogodkov in sodobnih izzivov, s katerimi se soočajo vojaški voditelji. Predstavljen je hibridni model vojaških študijskih potovanj, ki združuje zgodovinske študije s praktičnimi zahtevami sodobnega vojskovanja, s čimer učinkovito premošča vrzel med preteklimi analizami in sodobnim pomenom. Članek ponuja podrobne smernice za načrtovanje vojaških študijskih potovanj, vključno z vključitvijo vojnih iger, da bi ustvarili enotno učno izkušnjo. Predstavljen je idealen model pedagoškega načrtovanja, ki zagotavlja, da so učni cilji usklajeni z dejavnostmi, in ponuja različne modele za študij na terenu. Ta spoznanja spodbujajo službene vožnje kot ključno orodje v poklicnem vojaškem izobraževanju in zagotavljajo njihovo nadaljnjo pomembnost pri pripravi voditeljev na sedanje in prihodnje izzive.

**Ključne besede** *Vojaško študijsko potovanje, vojne igre, profesionalno vojaško izobraževanje, študij bojišča, vojaška študijska pot.*

**Abstract** This article underscores the vital role of staff rides in professional military education (PME), highlighting their ability to bridge historical military events and the contemporary challenges faced by military leaders. It introduces a hybrid staff ride model which merges historical studies with the practical demands of modern warfare, effectively bridging the gap between past analyses and present-day relevance. The article offers detailed guidance on planning staff rides, including the integration of war games, to create a unified learning experience. It presents an ideal pedagogical planning model to ensure the learning objectives align with the activities, and offers different models for field studies. These insights advance staff rides as crucial tools in PME, ensuring their continued relevance in preparing leaders for current and future challenges.

**Key words** *Staff rides, war games, professional military education, battlefield study.*

## Introduction<sup>1</sup>

The study of military history is central to preparing for the future. Studying the past helps interpret the present and build a stable foundation for what lies ahead. In warfare, learning from history is essential, to quote Ian Gooderson, from his study of the Canadian experience of the Battle of Ortona in December 1943:

*An enemy is best known by fighting him, for battle reveals his methods and tactics, and it indicates the ways and means of overcoming them. Such hard-won experience gained by a comparative few requires careful evaluation and the assimilation and dissemination of its lessons to ensure it benefits the many, and better prepares those yet untested for a similar challenge. (Gooderson, 2007, p 64 [Underlined words were italicised in the original.]*

This article examines a particular educational approach utilised in professional military education (PME): **the staff ride**, also known as **battlefield study** or a **military study tour**. The foundation of a staff ride is a *historical case study* with a strong emphasis on participants' active engagement and the necessity of *well-defined objectives*, sometimes referred to as *learning objectives and learning goals* (hereinafter, 'learning goals').<sup>2</sup>

Building on this foundation, this article introduces a **new hybrid model** for staff rides developed by Major Björkqvist of the Land Operations Division at the Swedish Defence University which optimises the balance between focusing on military history and emphasising lessons relevant to present and future contexts. This

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<sup>1</sup> This article is part of an ongoing project on Staff Rides and War Games in Professional Military Education at the Swedish Defence University. This article draws on these reports: *Staff Ride Handbook: Planning and Conducting Staff Rides* (2024); *En handbok om fältövningar: Att planera och leda en fältövning [A Handbook on Staff Rides: Planning and Conducting a Staff Ride]* (2023); and *Guide till praktisk examination av praktiska moment: konstruktiv länkning i praktiken i utbildningen av kadetter och officerare [Guide to Practical Assessment of Practical Exercises: Constructive Alignment in Practice in the Education of Cadets and Officers]* (2024); and the article "Staff Rides as a Pedagogical Tool in Professional Military Education (PME): Planning and Conducting Historical Staff Rides" in the *Journal on Baltic Security* (2022). While this piece goes beyond our other publications, it draws on them, and parts of this text can be found in our previous works. The authors would like to thank Docent Dr. Niklas Nilsson, Patrik Wiklund, Lt. Col. Dr. Lars Henåker, and the reviewers for their valuable feedback.

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<sup>2</sup> The two terms are often used synonymously. However, learning goals "generally refer to the higher-order ambitions you have for your students, while objectives are the specific, measurable competencies which you would assess in order to decide whether your goals had been met. (To give one example: if it were your goal to teach students how to critique theories of state formation, the corresponding objective might be: 'By the end of this course, students should be able to write an essay that explains one major theory of state formation and makes an argument about how well it describes the historical experience of a relevant country'.)" (*The Derek Bok Center for Teaching and Learning* (2024)).

model is further enhanced by the **integration of war games**, a tool which not only complements the historical analysis of staff rides, but also allows for the exploration of hypothetical scenarios and decision-making processes in a controlled, simulated environment. War games provide a unique educational advantage by allowing participants to engage with historical events to illustrate the tactical, operational and strategic challenges faced by commanders.

As outlined above, a staff ride is a form of case study. In the context of military education, a *case study* is a way of analysing specific practical examples to enhance understanding of military processes, strategies, operations, tactics, decisions, and outcomes. By examining real or simulated military situations (a battle, military operation, crisis, or decision-making process) a case study can delve deeply into specific scenarios to analyse mistakes, successes, and potential improvements. A case study can, for example, explore historical battles such as the Invasion of Normandy or the Battle of Ortona, contemporary operations in Ukraine or the Israel-Hamas war, or a simulation.

The key elements of a case study in military education include the selection of a relevant case, analysis of the strategic and operational context, and an examination of the tactical execution. It is also important to analyse decisions, identify lessons learned, and reflect on how the case study contributes to achieving the learning goals.

The case study approach is highly relevant in military education, as it develops critical thinking and problem-solving skills in officers and personnel. By analysing complex situations without clear rules, case studies also enhance decision-making, preparing military personnel for future challenges and offering more in-depth and realistic training which is crucial for successful military operations. The importance of case studies in military education is widely acknowledged. This is underscored by the fact that virtually all military educational institutions under the US Department of Defense utilise case studies in one way or another (Goldman et al., 2024, pp 33–34).

The remainder of the article is structured as follows: **Section 2** delves into the planning and preparation for staff rides, including the challenge of balancing historical analysis with thematic learning objectives (**Section 2.1**). It introduces a hybrid model for staff rides (**Section 2.2**), explores the integration of historical personas (**Section 2.3**) and war games (**Section 2.4**) into staff rides, and outlines a pedagogical planning model to ensure alignment between learning goals and activities (**Section 2.5**). **Section 3** focuses on conducting the field study, providing a comparison of different staff ride models and approaches to the field study (**Section 3.1**). The article concludes in **Section 4** by offering key insights and recommendations to enhance the role of staff rides as vital tools in professional military education.

## 1 PLANNING AND PREPARATION FOR STAFF RIDES

A staff ride is typically divided into three distinct phases: 1) a **planning phase**, in which the participants engage in activities which align with the case study and the intended objectives; 2) a **field study phase**, involving an on-site visit to the location of the historical event; and 3) an **integration phase**, in which the learning objectives from the previous phases are consolidated and analysed (UK ARMY General and Administrative Instruction (AGAI), Volume 1 Chapter 23 Battlefield Studies Policy Overview in the Institution of Royal Engineers, 2024; Knight and Robertson, 2020; Lasconjarias, 2014, 2014; Torkar, 2023; Weissmann et al., 2022, 2024). In addition to the three core phases of the staff ride, there are two supplementary phases: a **planning phase** which precedes the actual execution of the ride, and an **after-action review (AAR)** conducted by the instructor team following the completion of the staff ride (see Table 1).

The **planning, field study, and integration phases** are similar across different countries. In the United Kingdom, the staff ride, or *battlefield study* as it is now called, is divided into a *preparatory (learn theory) phase* which includes pre-study days and supports such as handouts, different lessons, a closed Facebook page, DVDs, and so on. The planning phase is followed by the *field study/execution (practical 'on the ground')* phase, where the actual staff ride is conducted. The focus of the final phase, the *integration (consolidation/prove learning) phase*, moves to how the participants have benefitted from the study, including, for example, possible briefs to their regiments, individual essays and sapper/soldier articles (Institution of Royal Engineers, 2024).

In the US, there is a separation between *the preliminary study phase, the field study phase, and the integration phase*. The book *Staff Ride: Fundamentals, Experiences, and Techniques*, published by the Centre of Military History of the United States Army, defines staff rides as follows: 'A staff ride consists of three essential and distinct phases: (1) the systematic preliminary study of a selected campaign, battle, or event; (2) an extensive visit (known more formally as a field study) of the actual sites associated with that campaign, battle, or event; and (3) an opportunity to integrate the lessons derived from each' (Knight and Robertson, 2020, pp 5–6).

The US model heavily influences Slovenia's approach, where staff rides, or '*Vojaško Študijsko Potovanje*' (military study tour), have adopted a structure consisting of *preliminary, field study, and integration phases* (Torkar, 2023). As outlined by Blaž Torkar (2023, p 9), '[a] military study tour consists of three phases: 1. a systematic preliminary study of a selected military conflict or event; 2. a visit (field study) to actual sites related to military conflicts or events; and 3. incorporation and analysis of the insights gained from the previous phases' [Authors' translation].

**Table 1:**  
Planning and  
executing a  
staff ride

Task	Phase	Group in focus
Designing and organising the staff ride	Planning phase	Instructors
	Preparatory phase	Participants
The staff ride	Field study phase	Participants
	Integration phase	Participants
Analysis of the intended and actual outcomes and planning for future iterations	After-action review (AAR)	Instructors

Staff rides are not merely ‘study trips’ or ‘battlefield tours’ aimed at passively learning about a historical site. Also, they should not be confused with a Tactical Exercise Without Troops (TEWT) (see Table 2). A study trip has no other requirements than to visit a place of historical importance. It usually involves some historical background, but its form can vary depending on the purpose of the trip. A ‘battlefield tour’ refers to visiting the site of a historical campaign or operation where little or no prior study has been undertaken by the participants (Knight and Robertson, 2020, p 5). A TEWT, on the other hand, involves a hypothetical scenario played out in the field, usually using a current doctrine unrelated to historical events (Knight and Robertson, 2020, p 6). In contrast, a staff ride, while being based on the importance of visiting the site of a historical case study, focuses on *the active involvement of the participants* with clear learning goals and includes a follow-up *integration phase*, which is of great importance for successful learning (Lasconjarias, 2014).

To quote the US Army Centre of Military History volume on the topic:

*Staff rides rely on maximum student involvement before arrival at the site to guarantee thought, analysis, and discussion. In this way, staff rides link a historical event both to the systematic study of it and to its actual physical environment, a combination which produces analysis in all dimensions. ... the staff ride requires active participation, which promotes active learning. To ensure an active learning experience, staff ride leaders should not simply be instructors lecturing to students. Rather, the staff ride leader should be more of a facilitator, who draws out student discussion by asking open-ended and Socratic-style questions in ways that make students engage with the subject matter, analyze and evaluate it on location and in context, and discuss their thoughts with their peers. (Knight and Robertson, 2020, p 6)*

When planning a staff ride, it is therefore important to consider not only practical constraints such as resources, logistics, and available time, but also key questions:

What is the purpose of the staff ride? What should the participants learn? How will the learning objectives be achieved? These elements ensure that the exercise is not just an academic endeavour, but a dynamic, practical experience which bridges the gap between past military events and today’s military thinking.

**Table 2:**  
Methods  
for studying  
historical  
cases (This  
table is a  
development  
from  
Lasconjarias  
(2014, p. 3))

	Staff ride	Battlefield tour	Study trip	TEWT
<b>Historical background</b>	Yes	Yes	Typically, but not necessary	No
<b>Participant involvement</b>	Active	Passive	Passive	Active
<b>Learning goals</b>	Yes	No	No	Yes
<b>Lessons learned</b>	Yes (integration phase)	No	No	Yes (after-action review)

## 1.1 Balancing the Historical and Thematic Focus in Staff Rides

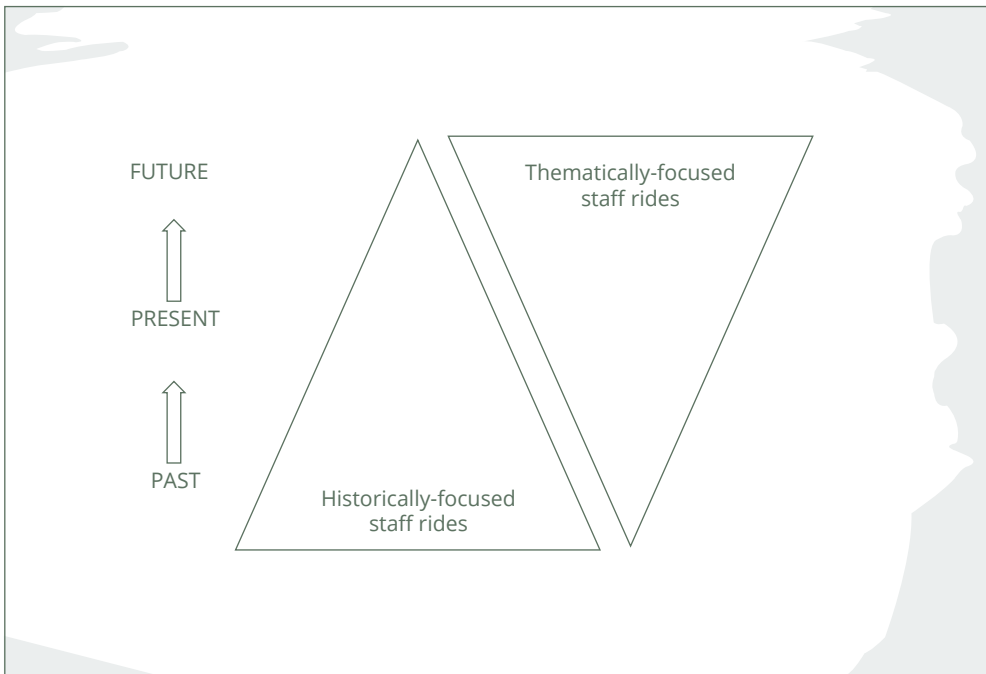
When planning a staff ride, one of the biggest challenges is striking a balance between studying military history and achieving learning objectives that emphasise lessons which apply to current and future battlefields and strategic contexts. We argue that a crucial consideration for the exercise director and planning team is determining the appropriate time and focus dedicated to *historical analysis* versus emphasising *thematic learning goals*, focusing on contemporary and future challenges. One of the issues here is how much attention should be paid to deepening the participants’ historical knowledge and insights in relation to the case study. How much emphasis should be placed on drawing lessons that are relevant to current and future practices and doctrines on modern battlefields? What will be valuable for future military strategies and operations?

At one extreme, a staff ride could have a purely historical focus, with discussions about the relevance of history to the present and future being minimal or merely supplementary. At the other extreme, the staff ride could be thematically driven by contemporary issues, with the historical case visit serving primarily as a symbolic addition. In most cases, in our experience, the learning goals of a staff ride are found somewhere in between these two extremes.

The dilemma outlined above can be visualised in the form of two pyramids, one with its base rooted in history and the other in the future, each representing the foundation of the learning objectives set for the staff ride. A staff ride with a strong emphasis on

history would have the past as its base, while exercises focusing on war planning, tactics and operational development, or those with a more general military science orientation, would highlight the present and future.

**Figure 1:**  
Historically  
versus  
thematically-  
focused staff  
rides



Regardless of the chosen approach, there is always a trade-off. The time allocated to a particular staff ride must be distributed to maximise learning towards the intended learning goals. This is particularly important for the participants' preparation and background reading in the preparatory phase. Although the aim should certainly be to find synergies between the historical and thematic elements, it is impossible to cover everything. Nevertheless, finding as many synergies as possible is a key reason for organising a staff ride. This is also why the **new hybrid model** for staff rides presented below was developed to offer an approach which ensures a solid historical foundation while simultaneously allowing for a thematic focus, thereby enabling meaningful lessons to be drawn from history for the present and future (See Table 3 'The Hybrid Model' below).



It is important to recognise that the participants will always need to do some reading — at least basic reading on the historical case study — to familiarise themselves with the events, regardless of the staff ride’s focus. For the instructor to determine what reading materials are necessary, the learning goals must be well-defined at an early stage in the planning process. Similarly, when participants clearly understand the learning goals, they can focus their reading more effectively. Clarifying the intended learning objectives from the outset not only saves time and increases efficiency but also enhances the overall quality of the staff ride.

## 1.2 The Hybrid Model: Balancing History with Thematic Relevance

In this article, we advocate for the adoption of a hybrid model for staff rides, developed by Major Jonas Björkqvist, which effectively balances historical analysis with thematic focus. This model addresses the need to integrate both past events and contemporary themes, enhancing the educational value and applicability of staff rides in professional military education. In this model, the terrain orientation, the description of historical events, their connection to the thematic focus of the site, and the exercise itself are guided by an instructor well-versed in military history and military strategy, operations, and tactics.

In this way, the hybrid model not only gives students more time to focus on the reading and preparation needed to achieve the learning objectives, but it also ensures quality and accuracy in the review of historical events. This aspect can often be challenging and time-consuming for participants with less knowledge of military history.

The hybrid model provides ample time for the participants to familiarise themselves with their respective thematic areas and prepare materials for their stands.<sup>3</sup> In this model, stands are designed to facilitate participation-driven discussions focused on specific themes, with historical context serving as a backdrop to draw upon and learn from. This approach ensures that while thematic areas take precedence in the discussions, history remains an integral component that enriches the learning experience.

To give a practical example, one of the staff rides the authors developed using the hybrid model centred on the Allied invasion of Italy, focusing on the winter campaign of 1943, particularly the battles of Ortona and Orsogna (*Operation Torso*). This staff ride focuses on urban warfare. It takes four perspectives on warfare in an urban environment, covering the spectrum from fighting for a single building to fighting for larger cities with complex terrain. By using the hybrid model, we were

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<sup>3</sup> In a staff ride, a ‘stand’ refers to a specific location where participants stop to conduct a learning activity. Each stand includes an examination and discussion of the events or decisions that took place at that spot. A stand may also be selected to provide insight into a particular theme or to meet specific learning objectives for the staff ride. As far as possible, the site of a stand is chosen to correspond with important moments, tactical choices, leadership challenges, or pivotal turning points in the battle or campaign. (For the historical origin of the term, see Knight and Robertson, 2020, p 12)



able to successfully complete the entire exercise while limiting the required reading on history, giving participants ample time to learn about urban warfare and prepare for their respective levels.

The participants were only required to read Ian Gooderson's superb nine-page article '*Assimilating Urban Battle Experience: The Canadians at Ortona*' (Gooderson, 2007) and about 30 pages from Marko Smedberg's book *From Sicily to Rome: the War in Italy 1943-44* (in Swedish, 2006) to cover the larger context of the battle. John Spencer and Jayson Geroux's case study of Ortona (2022) was for reference. With the two historical texts, we included Osprey Publishing's battlefield guide on *The Winter Campaign in Italy 1943: Orsogna, San Pietro and Ortona*, and Mark Zuehlke's key work *Ortona: Canada's Epic World War II Battle* as recommended reading, as well as an extensive list of texts, including books, articles, and official histories, on the topic. We listed other online resources, including links to museums, archives, selected video clips, films and podcasts; we also suggested some interesting commercial games.

This allowed ample time in the planning phase for the participants to read about the focus theme: urban warfare. The specific selection depends entirely on the learning objectives of the exercise, how much time is available for preparation, and the experience and knowledge of the participants.

The hybrid model also altered the structure of the stands; in this model, a designated expert from the instructor team provides terrain orientation and presents historical events at each stand. This individual must be well-versed in both military history and military strategy, operations, and tactics, and able to connect the historical dimensions of the case study to the strategic and tactical lessons observed. A military officer typically fills this role, to ensure the necessary tactical expertise and experience.

This approach guarantees a deep understanding of the subject, including the fine details, while accurately reproducing the historical narrative. This accuracy is often compromised when historical presentations are left to the participants, who often lack adequate training in historical methods or the time and resources to thoroughly research and prepare their presentations.

This method differs slightly from the traditional approach in Sweden, where each group prepared a thematic presentation and a presentation of the historical events at the site, including the terrain orientation. On arrival at the site, the exercise usually began with a brief (5-minute) terrain orientation, followed by a short historical overview by the group responsible for the site (10–15 minutes) (Weissmann et al., 2023, pp 22–23; see also Ahlström and Högström, 2009, p 16).

In our experience, the hybrid model also reduces the time required for presentations (See Table 3 'The Hybrid Model' below). Using a dedicated instructor who understands both the terrain and the historical context, the terrain orientation and

historical overview can typically be combined into a concise 5-10-minute session. This also ensures that the presenter keeps to the allotted time. This, of course, requires planning as well as strict control from the exercise director, in order to avoid the sometimes occurring problem of, to cite Brigadier R.A.M.S. Melvin, ‘a small minority of historians who may use these valuable training opportunities to pontificate on personal hobby horses or other matters of irrelevant detail’ (Melvin, 2005, p 76). By streamlining the presentations, more time can be allocated to the thematic elements of the exercise, both in the preparatory phase and at the stands in the field study phase. This also ensures that the presentations at the different stands follow a consistent flow and emphasise the facts that are most useful for learning and achieving the exercise objectives.

**Table 3:**  
The hybrid  
model

<b>Brief terrain orientation and a concise, learning-focused historical overview (5-10 min)</b>	<b>Dedicated instructor who is well-versed in both the terrain and historical context</b>
- Group presentation (10 minutes)	Participant group
- Seminar questions (20-40 minutes)	Participant group
- General conclusion (5-10 minutes)	Instructor
<i>Total time: ~ 50 min – 1 hour</i>	

Finally, the model may also help lessen some of the instructors’ burden, as their time spent reviewing literature on historical case studies can be reduced. Reading assignments can be better divided among team members and guided by an appointed instructor who is well-versed in the topic. This approach allows the readings to be effectively managed without undermining the essential requirement that, in order to successfully conduct such a staff ride, a deep understanding of the historical example in relation to the specific case and the broader historical context is crucial.

### 1.3 Enhancing Engagement with Historical Personas in Staff Rides

The authors have found that incorporating historical figures adds another dimension which further enriches the experience when conducting staff rides. This approach has been tested on trips in the Netherlands and Germany (*Market Garden* and *Operation Veritable*), and Ortona (Battle of Ortona, December 1943). It was also used when studying the Spring Offensive through the Ardennes in 1940 during a course for the Swedish Higher Joint Command and Staff Programme.

This approach is not a mandatory component of the hybrid model outlined above, but it has the potential to enhance participant engagement and improve learning outcomes. By assigning a historical figure from the case study to each participant, the staff ride gains a personal dimension which encourages the participants to engage more deeply with the historical context and decision-making processes of their assigned figures. During the staff ride, the participants can be asked to explain what their character did at certain points, or to speculate on how their character might have acted in hypothetical scenarios. These questions can be asked at various stages, such as during stand discussions or when studying maps, seamlessly integrating the character-centred method into broader exercises. As opposed to the US role-playing (character-driven method), (Knight and Robertson, 2020, p 43) the method as outlined here does not necessarily require the participant to do much research on their character – although in our experience, most participants tend to do some research, even if not required. The main focus is on encouraging participant engagement and developing a deeper understanding of the historical events, their dynamics and the responsibility one bears as a soldier or officer in such contexts. The latter is particularly useful for conducting staff tours with mixed military and civilian personnel. Depending on the focus of the staff ride, the characters can be assigned during the preparatory phase or in the field study phase. For a more historically focused staff ride, it is often better to assign the characters early on. For thematically orientated staff rides, however, it is often better to assign the characters during the field study phase. This ensures that the participants concentrate on the assigned tasks and reading during the preparatory phase, rather than focusing their attention on researching their character. The decision of when to assign characters will ultimately depend on the nature of the staff ride and what will best support the achievement of the learning goals.

The characters can also be useful when discussing or playing out developments on a map. This can be done by using the characters previously assigned to the participants, or by assigning new characters to certain stands or during certain tactical situations.

Additionally, the characters assigned to the participants can serve as reference points for the instructors, who can relate the broader historical narrative and terrain orientations to these figures. This link helps to personalise the historical events so that they are easier to understand. By incorporating character insights into the staff ride, the exercise becomes an immersive and reflective experience which deepens the connection between the participants and the historical context.

## 1.4 Integrating War Games Into Staff Rides

War games offer the opportunity to incorporate both learning and assessment dimensions. They can also cover the entire spectrum from the tactical to the operational to the strategic levels. In order to avoid limiting their potential, it is important not to see the game types too narrowly. Here, one can use or draw on the full range of possible approaches, including map, board, miniatures, matrix,

committee, role-playing, and collaborative solo games, as well as confrontational analysis/dilemma analysis games, and free and rigid Krigspiels (for different types of war games, see Armatys and Bassett, 2022. See also Simpson, 2018.). For the purpose of this article, we also include different tabletop exercises (TTXs) and similar discussion-focused simulations with few or no rules as a form of war game. It is possible to use both manual tabletop and computer-based games, although in most cases we have found that manual games are more useful during the field study phase for logistical reasons.

Valuable lessons and opportunities can be found not least in map, board, and matrix games. We have found that, depending on the context, both hexagonal and zone-based games offer distinct benefits, particularly during the field study phase. Hexagonal games are well-suited to detailed tactical and operational scenarios, while zone-based games are more effective for broader, less unit-focused simulations. Different tabletop games are, in most cases, better suited to the preparatory or integration phases. In addition, different types of card-driven games, as well as different approaches to game pieces and rules systems – whether through detailed rules-based games, analytical games or purely game master-driven scenarios – can contribute to a rich learning experience.

War games can take various forms, from short exercises such as short games at a stand, to more traditional, complex war games. Short games are exercises in which participants practise decision-making based on pre-determined scenarios. In contrast to short games, traditional war games are more complex, based on rule-based simulations. They often require a specially designed map of the battlefield or a simple terrain model, as well as game pieces representing different military units. These games can be based on historical cases to produce results which are relevant to current and future military contexts. Alternatively, a hypothetical contemporary scenario can be designed in the same environment by introducing new geographical or tactical challenges.

War games can be used during any of the three phases of the staff ride. They can be used during the preparatory phase to prepare participants for the field study; for example, the authors have successfully used war games in preparation for a staff ride studying the Battle of Crete in May 1941 (*Operation Mercury*). The board game *Operation Mercury: The Invasion of Crete* by Multi-Man Publishing was used to capture the dynamics of the nine-day conflict in May 1941, during which the combined force of the Commonwealth and Greek troops fiercely resisted German assault. Before the same staff ride, we also used a squad-level tactical combat game to play out the battle at Maleme airport on 20 May 1941, before discussing our experiences on-site a week later, during the field study phase.

War games can be used both off-site and on-site during the field study phase. The games can be played in hotels or barracks before or after a visit to a site or can be integrated directly into a stand. For example, the authors conducted a scenario

involving a tactical combat game at Ponte Dirillo in Sicily, Italy, where the participants were able to study the Allied forces' attempt to navigate through a hilly area dotted with bunkers on 10 July 1943. This location was ideal for such an exercise because the terrain today is very similar to that of 1943, and the amphitheatre-like shape of the terrain provides an excellent backdrop. A 5 x 5-metre gun emplacement is a perfect spot for a map and gamemaster, with a large hillside behind it, where the participants can gather to gain a comprehensive view of the 'game field' and its surrounding terrain.

War games can also be used effectively during the integration phase as part of the consolidation and synthesis of the knowledge and experience gained during the preparation and field study phases. When using war games in this phase, it is worth investing extra time and effort in the instructor team to ensure that the link with the field study works smoothly, promotes learning and supports the achievement of the learning goals. This often requires additional customisation to align the game with the objectives. It is also strongly recommended that some team members responsible for the game are present during the field study to ensure continuity and relevance.

However, we would argue that war games should not be seen as just one of the many tools available for staff rides. They represent an advanced means of combining two educational tools in professional military education: staff rides and war games. In the best of worlds, the two should be fully merged, and one or more war games developed hand-in-hand with the development of the staff ride, so that the two form a complete whole in which all parts are aligned with the purpose and learning goals.

We have explored this possibility with pedagogical development projects funded by the Swedish Officers Programme and the Higher Joint Command and Staff Programme's development funds. Among others, we have developed a staff ride and a card-driven war game targeting different perspectives on warfare in urban environments, focusing on the battles of Ortona, Orsogna, and Villa Rogatti och Sterlin Castle during the Moro River Campaign in Italy in 1943.

The game developed for this field exercise was a zone-based game in which different types of cards (such as event cards and competence cards) played an important role in simulating the friction and unpredictability of war. These cards can be compared to, but go beyond, the 'injections' or 'play cards' commonly used in various forms of war games and other analytical games. They also serve as tools to help the participants understand the dynamics of urban warfare and the challenges that may arise. The game can be played before, during, or after field exercises.

We have also explored, with good results, how low-level tactical map games can be utilised in relation to different stands for staff rides on the Battle of Crete 1941 (Operation Mercury), the invasion of Yugoslavia 1941, the Allied invasion of Sicily and Salerno 1943 (Operation Husky and Operation Avalanche), the siege of

Budapest, the Bulgarian advance into Yugoslavia in 1944, the Battle of Leros 1943 (Operation Typhoon) as well as for the Siege of Sarajevo 1992-96.

To date, the authors have focused their efforts on the 1941 Battle of Crete, achieving excellent firsthand results through the use of both strategic board games to represent the larger campaign and tactical map games at individual stations. Similarly, preliminary findings from their work on the 1943 Battle of Leros indicate consistent positive outcomes. The authors anticipate similar results in other cases, although the availability of quality board games may prove a limiting factor.

## 1.5 A Pedagogical Planning Model for Staff Rides

When planning a staff ride, an ideal model for pedagogical planning developed by Weissmann can be used effectively to operationalise the purpose and learning objectives of the exercise (see also Weissmann, 2024). This model is aimed at thematically focused staff rides rather than historically orientated ones, where the situation and/or location can take centre stage.

To ensure constructive alignment between learning goals and the learning activities, the first step is to clearly define the purpose, learning objectives, and learning goals of the staff ride. The planning process can then continue with the development and selection of practical learning activities (see Figure 2 below). The planning of an activity such as a staff ride can be broken down into five main components:

1. The theme, subject, task, or dilemma to be addressed;
2. The (tactical) situation;
3. The operational context;
4. The strategic context;
5. The specific situation or location.

Ideally, these five components should be considered in order, beginning with the purpose of the learning activity and determining how the goal will be operationalised in terms of theme, subject, task, or dilemma. Once this has been defined, a tactical situation is established, followed by the operational and strategic contexts. Finally, the situation and/or location best suited for achieving the objectives in steps 1–4 are selected.

Steps 2–4, particularly the operational and strategic contexts, are closely linked and, in real-world or historical cases, are often predetermined. These components may therefore need to be addressed together. The same holds for component 5, the location and, to some extent, the situation, which are often closely tied to the strategic context, operational context, and, to a lesser degree, tactical situations.

**Figure 2:** Ideal model for the pedagogical planning of a staff ride. (Source: Developed from (Weissmann et al., 2024, p. 32))

Purpose and learning goals	Theme, subject, tasks, or dilemma	(Tactical) situation	Operational context	Strategic context	Situation or location
Goal 1	→	→	→	→	→
Goal 2	→	→	→	→	→
Goal 3	→	→	→	→	→
	Towards practical implementation...				
	Choice and flexibility	→			
		Choice & flexibility decrease...			
	<b>PLANNING &amp; EXECUTION</b>				

Of the five components, the greatest flexibility is in the theme, subject, task, or dilemma. However, this flexibility gradually decreases as the planning approaches practical implementation (such as selecting the situation and location).

In practice, there are situations in which an ideal model for planning a practical learning activity is neither feasible nor realistic. This may be the case, for example, if you are bound to a specific location because of a war game for it (e.g. if only certain maps are available, only certain unit types or organisations are programmed into a digital game, or if the rules impose restrictions). This may also be due to the constraints imposed by an existing scenario (e.g. a scenario and campaign which have already been researched and developed, including reconnaissance trips, and for which there are insufficient resources or time to create a new scenario) or because a particular scenario has already been commissioned. Similar considerations may apply to strategic and operational contexts, but rarely to tactical situations.

In this situation, it may be necessary to work in reverse order, i.e. to start with the chosen situation or location and then consider the strategic, operational and tactical situation. Flexibility in the choice of topic, subject, task, or dilemma increases, as these components can often be significantly customised with the right knowledge and experience. Although this approach is not ideal, with the right expertise, constructive customisation can be achieved.



Notably, this is an ideal scenario; in reality, it often makes sense to work with all components in parallel because they are interconnected and interdependent. For example, it can be detrimental to learning to change the operational or strategic context frequently during an activity, as during a field exercise it may be more practical to work with locations in the immediate vicinity to avoid unnecessary travel. In short, it is always about how to maximise learning within the given time, place, resources (including instructors and materials) and students.

## 2 CONDUCTING THE FIELD STUDY: MODELS AND APPROACHES

The field study is the highlight of every staff ride—the culmination of all planning and preparations, serving as the basis for synthesis in the integration phase. It can be organised in many different ways and depends on various factors, such as the objectives of the staff ride, the location, the desired learning outcomes, the participants, and time and budget constraints. While we cannot provide a detailed itinerary for a staff ride due to space constraints, we will here provide examples of what a traditional staff ride might typically look like. Our aim is to provide readers with a toolkit that they can adapt according to their needs. This said, we would in most cases advocate for using the hybrid model's approach to the stands, as outlined above.

### 2.1 Comparing Field Study Models

In a traditional Swedish staff ride (see Ahlström and Högström, 2009; Högström and Baudin, 2018; Weissmann et al., 2022, 2023, 2024), the participants are typically divided into smaller groups or pairs during the preparatory phase, influenced by the number of participants, exercise sites, and instructors available. Each group is assigned or chooses a specific topic and is responsible for preparing a corresponding seminar and presenting the historical events associated with their assigned stand. The participants usually have to write some form of text and prepare seminar questions for group discussions, which are distributed before the exercise.

At the stand, the session generally begins with a brief terrain orientation of the site (about 5 minutes), followed by an overview of the historical events at the site (10-15 minutes). Sometimes an accompanying historian or instructor presents the overall historical context. However, even in this case, the participant group usually presents more practical tactical events at the site. The group then presents their findings on the assigned topic (10 minutes), which leads to a discussion based on the prepared seminar questions (20–30 minutes). The visit to each site is usually concluded with a short summary (5 minutes). The total time allotted for each practice site is usually about an hour, with a minimum of 45 minutes.

In addition to the seminar, the participants are given time to explore the site further, visiting local monuments, examining artefacts and checking information on site. The duration of this exploration depends on the site; some sites, such as Ouvrage La Ferté

on the Maginot Line or Pointe du Hoc, require significantly more time than others, such as the crossing of the Meuse or the crossing of the Ardennes in May 1940. If a site is particularly large, the visit may be combined with a break or lunch to give participants enough time to study the site in depth.

As described above, the hybrid model differs somewhat from this traditional approach in Sweden. In the hybrid model a dedicated instructor with in-depth knowledge of both the terrain and the historical context combines the field orientation and the historical overview in a concise 5-10-minute session. This efficiency reduces the time needed for presentations, allowing more focus on the thematic elements of the exercise both in the preparatory phase and at each stand. It also ensures the historical accuracy and relevance of the presentation.

The next example is taken from the United Kingdom, where Brigadier R.A.M.S. Melvin of the British Army has written about the activities at the stands. In his view, experience shows ‘that the following sequence of activities at each stand works well’ (Melvin, 2005, p 75):

*The first stage is a brief but clear **terrain orientation** – conducted by an officer of the directing staff who knows both the ground and the history well. ... The preferred approach is to pick out a number of key reference points that give the framework for subsequent narrative and discussion, using the standard method of ‘DIRECTION-DISTANCE-DESCRIPTION’, working left to right, front to back.*

*Second, a concise **historical description** or narrative is given by the accompanying historian (on a battlefield tour, veterans’ vignettes may be used at this stage to advantage). Strict control must be exercised over a small minority of historians who may use these valuable training opportunities to pontificate on personal hobby horses or other matters of irrelevant detail.*

*The third stage, and this important step is often overlooked, is an **introduction** to the discussion period by a member of the directing staff, and not necessarily the historian. In the present author’s opinion, this should be run by either the Exercise Director or a Senior Mentor to ensure that the training audience concentrates on contemporary issues and lessons rather than digressing on points of historical detail and personal interest. It is this authoritative introduction (and subsequent better focused discussion) that often distinguishes a really good staff ride from a perfectly acceptable battlefield tour.*

*Fourth, and the key stage of any stand, is the **discussion period** in which the training audience poses questions to the historians and the military directing staff, who respond depending on the nature of the issue. Often it is extremely difficult to gauge how long this period should last – clearly this depends much on stand content but not least on the time of day and the make-up of the*

*training audience. Some staff ride organisers may elect to nominate particular members of the training audience to speak on a prepared topic, or to comment on particular issues.*

*Fifth, the Exercise Director should **sum up** in a few minutes, highlighting the key lessons for contemporary and future operations. (This stage may not be required at each stand, but certainly should be held at the end of each day). Finally, an assistant member of the directing staff may give out any administrative points. (Melvin, 2005, p 76 [Bold in the original.] )*

As for the US, its model is highly formalised, both in execution and planning, with the eight-step training model of the army integral to the planning process: 1. Plan the training, 2. Train the leader(s), 3. Recon the site(s), 4. Issue the order or guidance, 5. Rehearse, 6. Execute the training, 7. Conduct an after-action review (AAR) to evaluate the training, and 8. Retrain if necessary (Knight and Robertson, 2020, p 9).

The field-study phase is divided into three distinct steps: *orientation, description, and integration* (Knight and Robertson, 2020, pp 29–36). In the orientation step, ‘the staff ride leader or another facilitator points out the group’s current location on a map, orients the participants to the cardinal directions and where they stand on the ground, and identifies key aspects of the environment that are relevant to the battle or event. Orientation ensures that the students understand where they are and what the area looked like at the time of the battle or other historical event’ (Knight and Robertson, 2020, p 30).

Orientation is followed by a description, where ‘the staff ride leader and participants describe the historic events that occurred at (or are related to) the stand location. If the preliminary study has been conducted properly, the participants should be able to describe the events (such as combat actions, unit movements, leaders’ decisions and actions, and individual soldier actions) with only selective prompting from the leader, thus avoiding the need for long lectures from the staff ride leader’. (Knight and Robertson, 2020, pp 31–32). In step three, analysis, the purpose is ‘...to develop critical thinking skills. This is done by prompting participants to analyze how and why things occurred and to evaluate their significance. Students can perform this analysis from one of two perspectives: *historical context* and *continued relevance*’. (Knight and Robertson, 2020, p 32 [Italics in the original].)

Finally, in the case of Slovenia, as with the overall approach to staff rides, the US model was adopted with the field study phase containing the Orientation, Description and Analysis steps (Torkar, 2023).

**Table 4:**  
Setting up stands

THEME	The traditional ('Swedish') model	The hybrid model	UK	US	Slovenia
<b>Terrain orientation</b>	<b>Item</b> Brief terrain orientation (5 minutes)	<b>Item</b> Brief terrain orientation and concise, learning-focused historical overview (5-10 min)	<b>Item</b> Terrain orientation	<b>Item</b> Orientation	<b>Item</b> Orientation
	<b>Person in charge</b> Usually participants, sometimes historians or instructors	<b>Person in charge</b> Dedicated instructor who is well-versed in both the terrain and the historical context	<b>Person in charge</b> Ibid.	<b>Person in charge</b> Officer of the directing staff	<b>Person in charge</b> Staff ride leader or another facilitator
<b>Historical description</b>	<b>Item</b> Brief onsite historical presentation (10-15 minutes)	<b>Item</b> Ibid.	<b>Item</b> Concise historical description	<b>Item</b> Description of the historical events	<b>Item</b> Description of the historical events
	<b>Person in charge</b> Usually participants, sometimes historians or instructors	<b>Person in charge</b> Participants	<b>Person in charge</b> Member of the directing staff (exercise director or a senior mentor)	<b>Person in charge</b> Staff ride leader and participants	<b>Person in charge</b> Staff ride leader and participants
<b>Group discussions</b>	<b>Item</b> Group presentation (10 minutes)	<b>Item</b> Group presentation (10 minutes)	<b>Item</b> Introduction to the discussion period	<b>Item</b> Analysis	<b>Item</b> Analysis
	<b>Person in charge</b> Participants	<b>Person in charge</b> Participants	<b>Person in charge</b> Participants and historians, military directing staff	<b>Person in charge</b> Participants and instructors	<b>Person in charge</b> Participants and instructors
<b>Conclusions</b>	<b>Item</b> Seminar questions (20-30 minutes)	<b>Item</b> Seminar questions (20-40 minutes)	<b>Item</b> Discussion period	<b>Item</b> Discussion period	<b>Item</b> Discussion period
	<b>Person in charge</b> Instructors	<b>Person in charge</b> Instructors	<b>Person in charge</b> Summing up	<b>Person in charge</b> Exercise director	<b>Person in charge</b> Exercise director
	<b>Item</b> General conclusion (5 minutes)	<b>Item</b> General conclusion (5-10 minutes)	<b>Item</b> Summing up	<b>Item</b> Summing up	<b>Item</b> Summing up

### 3 KEY INSIGHTS AND RECOMMENDATIONS

This article shows the crucial role that staff rides play in PME. Staff rides are not only historical exercises, but are also important in bridging the gap between past military events and the strategic, operational and tactical challenges of modern military leaders. Through a structured approach which includes preparatory, field study and integration phases, staff rides engage participants in active learning and foster the critical thinking and decision-making skills essential to modern military operations.

A key argument in this article is the need to strike a balance between the historical and thematic focus of staff rides. While traditional staff rides have emphasised in-depth historical analysis, there is an increasing need to ensure that these exercises also consider the practical realities of modern warfare. The examination of historical and thematic focused staff rides in this article emphasises the importance of this balance, arguing that a purely historical focus can overlook crucial lessons which are directly applicable to current and future military contexts. In this context, the hybrid staff ride model presented in this study is a particularly effective approach for thematically focused staff rides. This model preserves the integrity of historical studies and ensures that the insights gained are relevant to current military issues. By combining historical case studies and thematic discussions, the hybrid staff ride model allows participants to draw historically informed lessons which are applicable to current and future battlefields. This approach is particularly valuable for preparing military leaders who must navigate the complex world of modern warfare, where an understanding of the past, while important, is not sufficient.

The inclusion of war games as an addition to staff rides further enhances this learning process and, as this article argues, should be more fully integrated into staff rides. War games offer a unique opportunity to merge two educational tools – staff rides and simulations – into one cohesive learning experience. War games can be tailored to the specific objectives of the staff ride and provide participants with a hands-on learning approach which directly complements the historical and thematic content.

The effectiveness of integrating war games into staff rides is exemplified by the staff ride focused on the Moro River campaign in Italy in 1943 and, in particular, the Battle of Ortona. In this exercise, a map-driven war game was developed along with a staff ride which focused on different perspectives of urban warfare. The game utilised different map types to simulate the friction and unpredictability of war and provide participants with a deeper understanding of the dynamics of urban combat. This example emphasises the value of fully merging war games with staff rides, where the two elements form a complete whole, aligned to the purpose of the exercise and the precise learning objectives.

War games can be effectively employed during any phase of the staff ride – preparatory, field study, or integration. For example, they can be used in the preparatory phase

to familiarise the participants with the tactical and operational challenges they will face during the field study. During the field study itself, games can be conducted either off-site or directly on the stand to directly apply theoretical knowledge to the terrain under investigation. Finally, in the integration phase, war games can play a crucial role in consolidating and synthesising the lessons learned and ensuring that the knowledge acquired during the staff ride is fully internalised and applicable to future military challenges.

This article also presents an ideal model for the pedagogical planning of staff trips, emphasising the importance of constructive alignment between the learning objectives and the activities carried out during the staff ride. This model is not only a theoretical framework, but also a practical guide to ensure that the staff ride is purposefully designed to achieve specific pedagogical goals. Breaking down the planning process into five key steps which focus on aligning the theme, topic, task or dilemma with the tactical, operational and strategic context and the situation or location on the ground increases the relevance and effectiveness of staff rides.

## Conclusion

In conclusion, this article emphasises the continued value of staff rides in PME while offering further ideas to increase their effectiveness. Traditional formats have proven invaluable and continue to play an important role in military education. However, there are opportunities to refine these practices to meet the evolving needs of modern military training. The hybrid model, particularly for thematically focused staff rides and the thoughtful integration of war games as a complementary tool, offers a valuable approach to advancing this area. In addition, the ideal pedagogical planning model provides a solid framework for ensuring the alignment of learning goals and learning activities in staff rides, ensuring that their purpose and goals are met. This also ensures that they remain relevant and aligned with pedagogical research.

As military education evolves, so should the methods used to prepare future leaders. The concepts and models presented in this article offer valuable improvements that build on the strong foundation of staff rides. By embracing these innovations, we can ensure that staff rides continue to be a vital component in developing the skills and knowledge needed to succeed in today's and tomorrow's military environments. The future of PME lies in its ability to innovate and adapt, and the approaches presented here offer a balanced path forward that combines tradition with the evolving needs of today's military personnel.

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