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New Perspectives on Canada in the Second World War

*edited by Christine E. Leppard
and Abraham M. Roof*



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ABSTRACT: This volume offers a first step toward the unification of many disparate threads in Canada's history of the Second World War and new perspectives on Canada's political and operational wars. What emerges is both unsurprising, and surprisingly new. Canada at war was a young nation increasingly, and sometimes cheekily, pursuing its national interests—at the level of policy. Although historians have overlooked Canada's assertive role, through its joint defence measures and alliances Canada largely defined itself as a country, and combined close defence relationships with sovereignty. Operationally, in training, and in civil affairs Canada's inexperience resulted in a steep learning curve. Nonetheless, battlefield experience provided important lessons that, in most key areas, were willingly learned.

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New Perspectives on Canada in the Second World War

Edited by Christine E. Leppard and
Abraham M. Roof

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Introduction

Christine E. Leppard and Abraham M. Roof

Junior partners in a coalition war must balance their commitment and contribution to an alliance with their need to pursue their own national interests. These aims become problematic when, as often happens, particular aims of the junior partner do not perfectly align with those of the greater allied cause. This outcome was especially so for the newly independent Dominion of Canada upon the outbreak of war in 1939. Having had control over its foreign policies only since the signing of the Statute of Westminster in 1931, the war with Germany was the country's first opportunity to define its independence in real terms; to determine its own national goals and fight for them. For Prime Minister William Lyon Mackenzie King, this aim meant asserting Canada's independence from its bigger allies, Britain and the United States, while keeping the country united behind the war effort.

Over the next six years of war, Canada raised its largest army ever, made critical contributions to the strategic bombing campaign, and protected Britain's lifeline by guarding the safe and timely arrival of convoys travelling across the North Atlantic, all the while gearing its economy to wage total war. And yet, the country remained a junior partner in the Grand Alliance, tied historically and psychologically to Britain, but growing ever closer politically, economically and culturally to the United States. Military strategy was left to the Combined Chiefs of Staff—out of Canadian hands—while Canadian forces had to learn modern warfare, and then how to fight it, alongside American, British and Empire troops.

With little to no role in strategy, Canada's war experiences were divided between higher policy and the actions of men on the ground, leaving a vacuum in the traditional 'middle'. Perhaps in response to this divided nature of Canada's war experience, historians rarely have offered a unified study of Canada's Second World War. Instead the historiography has been divided along two separate paths—rarely the two have met. Down one path, historians have studied Canada's transformation from colony to nation (or colony to nation to colony) during the war. In 1939, Canada entered the war a sovereign country, but with no experience or institutional knowledge of what that meant in practice. Throughout the war, the government determined a set of national interests, and derived a distinct foreign policy to pursue those goals. And yet, Britain's vulnerability led Canada to become closer than ever

before to the United States, a trend that continued throughout the Cold War. Down the second path, historians have focused on the operational and tactical levels, where Canada's army, navy and air force had to equip, train for and then fight modern warfare. On all fronts, the quality of the Canadians' performance was condemned until the 1990s, when Canadian military historians largely moved away from political-diplomatic questions in order to broaden and deepen their understanding of Canadian performance on the battlefield.

This book aims to bridge the divide by offering new perspectives on Canada's political and operational wars in a single volume. It originated at a conference on the Second World War hosted by the University of Calgary in Lake Louise, Alberta, in September 2009. The first section examines Canada as alliance partner. In chapter one Galen Perras assesses the historiography of the topic. There has been an unfortunate and persistent tendency by Canadian historians, he argues, to accept Colonel C.P. Stacey's official histories as canon, thereby overlooking areas in need of research or re-assessment. Perras notes many questions of coalition war that require detailed study, including Canada's economic alliances; outlook towards the Pacific Theatre; bi-lateral relations with allies; and the Hong Kong debacle of 1941. Even the well-trodden topics of British-Canadian and American-Canadian relations are still wide open, especially the influence which key foreign officials had in Ottawa. Perras reminds us that the passage of time has removed official barriers to almost all key record groups and manuscript collections, leaving little excuse for a new generation of historians not to challenge the accepted historiography.

A concept central to the study of Canada's bi-lateral relationship with the U.S. is "defence against help". As a country far outmuscled by its southern neighbour, Canada has done just enough to defend its borders so that the U.S. never had to step in, breaching Canada's geographical and political sovereignty as it did so. In chapter two, Richard Goette argues that this paradigm does not apply to the active participation of Canadian officers on the Permanent Joint Board of Defence (PJBD) in 1941. Command was the acid test of sovereignty; the efforts of Canadian officers to find a balance between combined command and control arrangements with the Americans, while still ensuring that Canadian forces remained under Canadian command, were vital to safeguarding sovereignty.

During the 1941 PJBD discussions, Canada rejected the American desire for unity of command under an American officer, and instead enforced ABC-22, under which each nation retained strategic direction and command of its

own forces, while working for mutual cooperation. The results were mixed. On the quiet theatre of the West Coast, cooperation remained fluid, but when trying to coordinate the critical convoy air support out of North America relations were tense. Ultimately, however, Canada insisted that the strategic threat did not warrant unity of command, and championed mutual cooperation. This functional approach protected Canadian sovereignty, and set a precedent for Canada-U.S. continental defence during the Cold War. Goette argues that Canada was not simply defending itself against help, but actively used its operational control over Canadian forces to bolster North American defence and Canadian sovereignty.

A similar agency can be found in Canada's economic relationship with Britain and the U.S. In a re-examination of the Hyde Park agreement, Abraham Roof argues that following the Lend-Lease Act of February 1941, Canada crafted a policy to protect its national interests and largely at the expense of a nearly bankrupt Great Britain. Contrary to the traditional thesis that British weakness forced Canada into the arms of the U.S., Roof demonstrates that Mackenzie King, Minister of Munitions and Supply C.D. Howe and Deputy Minister of Finance Clifford Clark effectively achieved the best deal for Canada from Lend Lease. In February 1941, Dominions Secretary Lord Cranborne threatened to seize British orders in Canada and switch them to the U.S. if Canada did not join Lend Lease. In the following weeks, Mackenzie King and Clark devised a plan by which British orders to Canada using American components would be charged to Britain's Lend Lease bill. They then devised a reciprocal trade programme for the U.S. and convinced the Americans of the plan's viability, had Roosevelt sign the agreement at Hyde Park, all the while keeping the British largely in the dark. Britain's pecuniary crisis may have forced Canada to cooperate more closely than ever before with the U.S., but Canada did so on its own, well calculated, terms.

The Canadian media positively embraced the country's changing relationship with the United States. In his analysis of the media representation of the First Special Service Force (FSSF), Jim Wood in chapter four argues that the Canadian and American media idealized the force as distinctly 'North American', and therefore symbolising the shared values of the continent at arms. Even when the administrative difficulties inherent in a bi-national formation led to the Force's disbandment, it remained a symbol of Canadian-American good relations. Wood concludes that it was thanks to wartime media coverage of the FSSF that the legend of a uniquely North American military formation is remembered today.

In the final chapter of Section I, Alex Herd demonstrates that, in a manner similar to the defence and economic spheres, Canada in the Cold War became closer doctrinally to the U.S. as a matter of policy, planning, and education. After the war, the Canadian Army Staff College sought to train officers for amphibious warfare. Operation Gulliver, from 7-21 March 1947, a staff exercise devoted to this end, was scripted to reflect the American attack on Cherbourg in 1944. Ultimately, the operation was about learning how a British-style organization like the Canadian Army could undertake an American military operation. During the Cold War, the Canadian army was not simply pulled into the American orbit. The Army Staff College sought methods by which Canada could adapt its existing structure to work symbiotically with American military doctrine.

Altogether, the chapters of the first section point toward a Canada more calculated than conventionally thought in its diplomatic, economic and military relationships with Britain and the U.S., and to a Canadian media and public which were amenable to the country's new friendship with their neighbours to the South. This is a new view of Canada's wartime alliances, one where Canada was active and assertive in pursuit of its own interests, and Canadians liked the results.

Section II moves from politics and economics to operations and tactics. Here, too, the results point to a more confident Canada than has been previously understood. Moving away from a traditional review of performance, this section considers how Canadians learned to fight on the modern battlefield. In chapters six and seven, Will Pratt and Christine Leppard investigate the tactical changes made by Canadians in order to fit their armoured doctrine to the rugged Italian terrain.

Pratt argues, contrary to popular belief, that armoured doctrine in Italy was dynamic. Armour increasingly was used at points where the German enemy least expected it. The Sherman tank, with good mobility over rough ground, was a technology ideally suited to this doctrine. Moreover, argues Pratt, historians' fascination with the technology of the tank has at times obfuscated a nuanced picture of the Italian Campaign. The experiences of tank crews show that there was much more to armoured warfare than muzzle velocity and horsepower. Reliance on the logistic capacity of military mules in the mountainous terrain of Italy counters the tropes of the Second World War being a case of mechanized warfare par excellence.

One Canadian tactical innovation during the war was the use of task forces, small battle groups designed to allow the Canadians to attack at tank speed, with enough infantry and supporting artillery to handle any battlefield

contingency. Leppard argues that task forces, developed in Sicily in response to the Italian terrain and German defences, were used successfully against German fighting retreats to the Liri Valley. They stemmed from a Canadian learning curve. Yet in the breakout from the Hitler Line in May, 1944, the task forces organised by Bert Hoffmeister proved too weak to advance speedily in the chaotic environment of the German retreat. When infantry were pinned down by small arms fire, the tanks kept attacking, resulting in disparate, and mediocre, local attacks. The Canadian reaction, argues Leppard, highlighted the maturity of their learning curve, as Canadian officers recognized that these task forces had been too weak to accomplish their objectives, and thereafter did not use them in the breakout from German strongpoints.

The final three chapters of the book address not only what tactics the Canadians were learning, but also *how* they were learning to wage war. In chapter eight, Craig Leslie Mantle deconstructs the ideal Canadian officer. The Canadian Army, he argues, expected junior officers to secure the trust and compliance of its men by, first, effecting a paternalistic approach where the interests of their men were put first. Secondly, officers were to demonstrate an expertise appropriate to their rank and trade; and, thirdly, to conduct themselves with the highest morals. In addition, officers were tasked with the seemingly contradictory mission of both maintaining stiff discipline among their subordinates, as well as high morale. Together, these standards were the archetype to which all officers were expected to aspire.

Training officers to lead was accompanied by the difficult task of training soldiers to fight. As Russ Benneweis demonstrates in chapter nine, achieving a high standard of training was out of reach for the South Saskatchewan Regiment. Wading into a heated debate in the historiography over whether the Canadians were well trained for Normandy, Benneweis' case study into one regiment's experience, determines that the quality of their training was left wanting. Too much attention was paid to parade drill, and not enough on infantry/armoured cooperation.

In the final chapter of the volume, David Borys examines Canadian Civil Affairs in North-West Europe—the first in-depth study of this topic. Borys illuminates a problem acute within Civil Affairs (CA), but also generally affecting the Canadians, and that is how they had to learn and adapt on the battlefield. Although Canadians had been trained in Civil Affairs before the invasion of Normandy, the difficulty of population control, re-establishing effective government, and addressing the basic necessities of civilians, tested the mettle of the Canadian CA officers, and meant that learning had a high cost from Caen to the Channel Ports. Together, these chapters emphasize that

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Canadians trained towards an ideal type, be it in junior officers, battalion training or civil affairs, but faced the reality that the best training for war, was war.

This volume has offered a first step toward the unification of many disparate threads in Canada's history of the Second World War. What emerges is both unsurprising, and surprisingly new. Canada at war was a young nation increasingly, and sometimes cheekily, pursuing its national interests—at the level of policy. Although historians have overlooked Canada's assertive role, through its joint defence measures and alliances Canada largely defined itself as a country, and combined close defence relationships with sovereignty. Operationally, in training, and in civil affairs Canada's inexperience resulted in a steep learning curve. Sometimes, as with training, it was not steep enough. Nonetheless, battlefield experience provided important lessons that, in most key areas, were willingly learned. We hope that the emerging generation of Canadian military historians will further integrate the experiences of Canada in the Second World War.

Is There More to Be Said? Examining the History of Canada's Alliances in the Second World War

Galen Roger Perras

The following tale illustrates a problem that has afflicted the study of Canada's role in the Second World War. In May 1990, I gave a paper, "Canada as a Military Partner: Alliance Politics and the Campaign to Recapture the Island of Kiska," at the Canadian Historical Association's annual meeting in Victoria, BC. This paper, derived from my MA thesis,¹ emphasized the civil-military machinations that ensued when an overeager Canadian Army, desperate for battlefield success after catastrophes at Hong Kong in December 1941 and Dieppe in August 1942, plunged headlong into an American-led operation to expel Japanese forces from the Aleutian Islands in 1943. Though Canada sent 5,000 home defence conscripts to Kiska, in itself a risky political choice, that project nearly foundered when Canada's notoriously cautious Prime Minister, William Lyon Mackenzie King, pondered scuttling it in late May 1943. Only the direct intervention of N.A. Robertson, the Under Secretary of State for External Affairs – Robertson believed that sending Canadian troops to the Aleutians would counter-balance the large and politically dangerous American presence in northwest Canada in such projects as the Alaska Highway and Northwest Staging Route – convinced King to permit the expedition to go forward. Still, the military had to accept potentially troubling political limitations on the use of the Canadian troops.

The CHA's publication, *The Journal of the Canadian Historical Association*, had the right of first denial for publication. After some delay, I received two referee reports. The first judged that a revised version could be published by the *JCHA*. But the second report, just one paragraph long, maintained that C.P. Stacey, the Canadian Army's official historian, had said all that needed to be said about the Army's role in the Second World War! I found this assessment disconcerting. Stacey's account of Canada's Aleutian role, found in Volume 1 of the Canadian Army's official history, is less than 15 pages long. Further, as Stacey's account emerged in 1955, he lacked access to then unavailable materials, including King's voluminous diary and personal papers. Thus, Stacey's description did not discuss the civil-military contretemps that

almost derailed participation at Kiska, my paper's very focus. After making minor changes, I sent the manuscript to *The Journal of Military History* for consideration. This second group of referees praised the paper, with one calling it a necessary and welcome revision of Stacey's conclusions. *JMH* published my paper in 1992.²

Likely every historian interested in Canada's role in the Second World War can relate a similar story. As Tim Cook's fine study about the writing of Canadian military official history has noted, Stacey's balanced scholarship earned him a remarkable reputation in various constituencies, be they military, political and the general public.³ And while all of us who study Canada's military and external relations policies prior to 1950 must acknowledge how much we owe to Stacey's seminal studies, his most influential works, *Arms, Men and Governments: The War Policies of Canada 1939-1945*, and the two volume set, *Canada and the Age of Conflict*, came out in 1970 and 1984 respectively.⁴ But as J.L. Granatstein, whose has written extensively on Canada and the Second World, noted in his address to the conference that sparked this volume, it is time to rethink and revise that role. Referring to his own seminal 1975 study of how King's government prosecuted the war,⁵ Granatstein averred that the advent of key new sources and historical methodologies since the 1970s have dictated that key aspects of the Canadian experiences in the Second World War, domestic and foreign, must be rethought.⁶

Commendable efforts have already begun. My colleagues in the Department of History at the University of Ottawa, Jeff Keshen and Serge Durlinger, have completed superb accounts of Canada's home front experience.⁷ Further, after embarrassing delays, the official histories of the Royal Canadian Air Force (RCAF) and the Royal Canadian Navy (RCN) for the Second World War period have appeared, though the RCN series is ongoing.⁸ But this short paper, while endorsing Granatstein's challenge that so very much about Canada's part in the Second World War remains to be done and/or redone, will focus more narrowly on aspects of Canada's external relationships during the war. Not intending to be exhaustive, instead, I will highlight issues needing proper illumination.

For a country that has always gone to war in alliances with other and usually stronger powers, it seems odd to suggest that the history of Canada's relationships with its allies in the Second World War remains inadequate. Stacey provided a sound base upon which we can build with *Arms, Men and Governments* and *Canada and the Age of Conflict*. Still, these works are dated, and the first is an official history, replete with all the advantages and disadvantages that official history engenders. Further, Stacey, no fan of Prime

Minister King as his separate 1976 study of King's diary made clear,⁹ can be accused of not giving King much credit when it comes to the management of external affairs. King only relinquished that job after the war's end when Louis St-Laurent became the first non-Prime Minister to hold the position of Secretary of State for External Relations (SSEA). Moreover, the third volume of H. Blair Neatby's biography of King, which ended in 1939, looked only at the war's earliest days.¹⁰ We thus badly require a new look at King's wartime foreign policy.

In 1938, King famously told a visiting British diplomat "that his [King's] experience of political life had taught him that any success he had been attained had been due far more to avoiding action rather than taking action."¹¹ Certainly many who worked for the Prime Minister during the war probably would have agreed with King's self-assessment. In January 1942, Escott Reid of the Department of External Affairs (DEA), among other things, recommended separating the posts of Prime Minister and SSEA in order to better advance Canadian foreign policy interests.¹² Unsurprisingly, King did not act on that proposal. Thus, in early 1942, another DEA official, Hume Wrong, no fan of King, formulated the Functional Principle which provided Canada with a defensible rationale for taking on a greater role in the war's direction. As both Granatstein and A.J. Miller have pointed out in two short pieces,¹³ Functionalism, although sometimes a useful means to advance Canadian interests in a multi-national coalition dominated by a handful of great powers, could not overcome hard power disparities. As General Maurice Pope aptly put it, Canada's lack of "big battalions" and its limited military experience likely would not "have made us competent to give it [advice] effectively."¹⁴ We badly need to reconcile such conflicting notions about Canada's ability to promote its interests. John Allan English's excellent 1996 chapter on Canada's wartime foreign policy offers a blueprint for a much larger work on the subject.¹⁵ John Hilliker's official history of the DEA from 1909-1946 is useful too for explaining how the DEA functioned during the war.¹⁶ Biographies of Norman Robertson and his fellow DEA officer, Lester Pearson, by J.L. Granatstein and John English respectively, and John MacFarlane's fine account of Ernest Lapointe's influence on Canadian foreign policy¹⁷ have widened our understanding of wartime policy making. But a recent edited study of Reid's diplomatic career, while useful for the pre- and postwar period, oddly said nothing about Reid's wartime years.¹⁸

We already have very good accounts of Canada's economic policies. Two books by J.L. Granatstein and Doug Owrarn about governance roles played by officials and intellectuals in the 1930s and 1940s have provided a frame-

work for other studies to come.¹⁹ Archivist/historian Paul Marsden has written a good short account of Canadian financial planning for war in 1939.²⁰ So too has Hector MacKenzie, a historian at the Department of Foreign Affairs and International Trade (DFAIT), with his focus on the substantial financial aid that Canada extended to Britain during and after the war.²¹ Francine McKenzie has added much to the historiography with a detailed and balanced monograph looking at the politics of imperial preference from 1939-1948. We also have a classic insider account of the Department of Finance's international operations from Robert B. Bryce, one of Canada's leading public servants for forty years.²² Still, a detailed study of Canadian-American economic relations in the war is lacking, no small job given the sheer scale of that vast interlocking effort after the 1941 Hyde Park Agreement, a pact that remains largely unexplained barring a short chapter in a 1975 book produced by Granatstein and R.D. Cuffe.²³

More needs to be done about direct bilateral relations between Canada and its various allies. Canada-Soviet ties would be a good place to start. Stacey's *Arms, Men and Governments* and volume two of *Canada and the Age of Conflict* mention the Soviet Union only a handful of times. This is an odd omission given the vital role Soviet forces played in defeating Nazi Germany, the opening of formal diplomatic relations between Moscow and Ottawa in 1942, and the fact that the Soviet Union was a major recipient of Canadian Mutual Aid. In 1998, J.L. Black, using extensive Russian-language sources, gave us a finely detailed study of how Soviet officials perceived Canada from 1917 to 1991 through an often distorted ideological lens. Soviet claims about Quebec fascism and a belief that postwar revolution in Canada was possible are especially interesting.²⁴ Some survey articles by Norman Hillmer and J.L. Granatstein about Canada-Soviet relations in the 1930s and the war, in a 1992 edited volume, have provided firm bedrock upon which further research into the subject should proceed, as has an edited 1981 monograph from Aloysius Balawyder.²⁵ But both collections draw their primary materials solely from Canadian sources, an unavoidable problem as they were researched during the Cold War. With better access now to formerly closed Soviet archives, we can hope that an historian will soon give us a truly bilateral view of the beginning of the Canada-Soviet relationship.

We also lack a big study on Canada's wartime connections to China, another major recipient of Mutual Aid and, like the Soviet Union, a country that Canada did not establish formal relations with until after the war had begun (by contrast, Canada had sent a diplomatic representative to Japan in 1929). Political scientist Kim Richard Nossal completed a fine but unpublished PhD

thesis in 1977 about General Victor Odlum, Canada's Ambassador to China from 1943 until 1946. Instead, we must rely on Nossal's short 1977 essay about Odlum's quixotic diplomatic career in China (Odlum, relieved of divisional command in 1940, peppered Prime Minister King with increasingly plaintive requests to be returned to active military duty, requests King happily declined).²⁶ Works by Alwyn Austin, A. Hamish Ion, and Paul Mitchell about Canadian missionaries in China and the Japanese empire have offered some limited clues about the Canada-China relationship. But perhaps an historian, with facility in Chinese, will soon give us the big and comprehensive study we so badly require.²⁷ We can hope.

We possess a good selection of mostly short studies about Canada's wartime ties to Australia. There are good reasons for this happy situation. First, despite the Australian predilection for elongated vowels and rhyming slang, our two nations share a common language. Second, our historical imperial ties have made two countries obvious case studies choices on a variety of thematic fronts. DFAIT's Greg Donaghy has produced an excellent short survey of Canada-Australian relations since 1890s. Greg's former boss at DFAIT's Historical section, John Hilliker, has discussed the bilateral relationship in the Second World War in the *Journal of Imperial and Commonwealth History*.²⁸ If these two fine accounts can be faulted, while admitting ties were not close, they have downplayed the harder edges of that relationship in the 1930s and the war years. R.G. Haycock's 1984 article in *War & Society* has painted a darker picture regarding Victor Odlum's near disastrous tenure as Canadian High Commissioner to Australia in 1942, brought on by Odlum's unauthorized offer of Canadian military aid to Australia, aid that never materialized though it took King months to actually to say no.²⁹ My work has echoed Haycock's analysis. Indeed, I have traced some of the enmity to a prewar attempt, spurned initially by Australia, by Canada to establish direct diplomatic relations. Australia rejected this initiative for two reasons: it refused to "reward" Canada for its anti-imperial stance; and its leaders believed they could rely solely on British diplomacy.³⁰ But the formal establishment of relations in the winter of 1939-40 and cooperation against German aggression could not obscure the fact that Canada and Australia had vastly different views of the global strategic situation. Japan's attack on Western interests in the Asia-Pacific region in December 1941 and the startling Japanese victories that followed over the next six months engendered real concern among Australians for their nation's future, concerns that Canadians, beyond Odlum, cared little about. As I noted in a 2003 chapter, real bitterness ensued when Canada declined to send help to

Australia in 1942, bitterness that grew when Canada also showed no interest in Australian initiatives to create a formal imperial security system for the Pacific in 1944-45.³¹

What is left to do then in Canadian-Australian relations? Quite a bit, actually, as John Blaxland, an Australian Army officer, has shown us in his 2006 book, *Strategic Cousins: Australian and Canadian Expeditionary Forces and the British and American Empires*. Relying deliberately on secondary materials, Blaxland has made obvious the great need to put Canadian and Australian security policies in a wider strategic and temporal context.³² In short, we badly need a successor to Richard Preston's seminal monograph, *Canada and 'Imperial Defense': A Study of the Origins of the British Commonwealth Defense Organization, 1867-1919*, that would carry forth a broader Commonwealth (not just Canadian) focus into and beyond the Second World War.³³ Such a study could examine Canadian Mutual Aid to Australia, the United Kingdom and other Dominions, the nature of imperial military intelligence cooperation (or lack thereof), and differing views by Commonwealth members about global & regional strategic situations stretching back to the First World War. Kurt Jensen's recent study of Canadian foreign intelligence from 1939-1951 is a good start, but its focus, subjectively and in terms of primary sources used, is narrowly Canadian.³⁴

I further suggest that Canadian views of the strategic situation in the Pacific needs greater elucidation. Both Gregory Johnson and I have made a start with our respective doctoral dissertations about the creation of a "North Pacific Triangle" in the 1930s and Canadian-American cooperation in the Aleutian campaign.³⁵ Each of us is currently revising these studies for future publication. In the meantime, good short studies do exist. Greg and I have co-authored a chapter about Canadian perceptions of the Japanese threat prior to 1931 in an edited collection about Canada-Japan relations. That volume also contained papers by John Meehan about Canada-Japan relations from 1929-1941 (summarizing his monograph on that subject), as well as a very good survey of Canada's military contribution to the war against Japan from William Rawling.³⁶ Canada's decision to participate in a US-led invasion of Japan scheduled for 1945-1946 also merits more work. My short 1997 paper explaining why Canada opted to integrate its Army Pacific Forces into a US, rather than a UK, command system, is only a beginning. Part of this story has been told in a 2009 book by American historian Nicholas Sarantakes, in *Allies Against the Rising Sun: The United States, the British Nations, and the Defeat of Imperial Japan*.³⁷ But more remains to be said, especially failed British attempts to convince the Dominions to take up much of the imperial cause

against Japan on 1944-1945 so that Britain could demobilize and rebuild its battered economy.

Another subject crying out for a good monograph is the tragic and poorly understood loss of 2,000 Canadian troops at Hong Kong in December 1941. At a February 1992 meeting of the Canadian Committee of the History of the Second World War, in a paper discussing how the multi-national historiography of the battle of Hong Kong had unfolded, I had emphasized two things: first, despite its flaws, which the author admitted in his memoirs,³⁸ Stacey's account of Hong Kong in his 1955 Army official history remained the best account; and second, there was room for one more monograph on the subject that would supplant hopefully the dominant place in the Canadian public imagination held by Carl Vincent's flawed and anti-British 1981 monograph on Hong Kong.³⁹ What I had not counted on then was the Canadian Broadcasting Corporation's decision to air a three-part television documentary looking at aspects of the Canadian military experience in the Second World War in 1992. Though its' most controversial part concerned intimations of war crimes committed by Allied crews for the bombing of German cities, *The Valour and the Horror* also depicted Hong Kong's loss when Japan seized that crown colony in December 1941. Taking its cue from Vincent's claims, the show charged that British perfidy – an unwillingness to send British troops to a post that had no chance of surviving an attack – and Canadian governmental and military incompetence – sending obviously ill-trained troops after practically no debate – led to the disastrous loss of 2,000 Canadian troops when Hong Kong fell. One result was an ugly public debate led by members of Canada's Senate that engendered hard feelings on all sides.

Most importantly, the fracas created some good history. A 1994 monograph edited by two senior Canadian military historians studied the various angles of *The Valour and the Horror Controversy*, including a fine piece by John Ferris that dissected the allegations of British perfidy. I authored a journal article in 1995 that did much the same.⁴⁰ Two books, one co-authored by Canadian and Japanese historians in 1990, another by Canadian medical historian Charles Roland in 2001, though Hong Kong was not their focus, helped to establish a much needed wider context that refuted both Vincent and *The Valour and the Horror*.⁴¹ If this is so, why do we need another book about Hong Kong? Well, Brereton Greenhous's 1997 monograph on the topic, sponsored by the Canadian War Museum, reads like Vincent Part II.⁴² Selective in its use of evidence – like Vincent's book, few British primary sources were consulted – and dismissive of contradictory analyses – none

of the critical secondary sources mentioned above are cited – Greenhouse's book sadly added little to the debate. We need a thorough weighty tome, free of crude nationalist bias and a lingering post-colonial cringe that offers a sophisticated exploration of how 2,000 Canadian troops stepped into Hell in December 1941. This study will have to take into account fears of further appeasement of Japan and a broader attempt by Britain and the United States in 1941 to deter Japan through embargoes, sanctions, and the reinforcement of Allied assets in the Asia-Pacific theatre.

The Hong Kong issue illustrates a true puzzle; an odd absence of good historical accounts about the complex Canada-Britain relationship in the war other than the Stacey and Granatstein volumes noted above. But time's passage has meant that key manuscript collections that were closed when those books came out, including the vital Winston Churchill papers and various British official record groups, are now open. We lack a dedicated monograph that looks at the contentious birth and workings of the massive British Commonwealth Air Training Plan (BCATP) that was centered in, and largely paid for by, Canada. F.J. Hatch's short official account from 1983 has not filled that gap, not least for its near complete reliance on Canadian sources and its tendency to play down the acrimonious debates among Canadian and British officials about who would pay for the plan.⁴³

More explanation of how Canada and Britain sought to mesh their respective war efforts at the highest political levels is necessary too. Clyde Sanger has written a breezy journalistic account of Malcolm MacDonald's role as British High Commissioner in Ottawa for much of the war. But it is a thinly documented story based mostly on secondary sources and MacDonald's personal papers.⁴⁴ The story of Canada's High Commissioner to Britain, Vincent Massey, is better documented thanks to Massey's self-important memoir and a good biography by Claude Bissell.⁴⁵ Two recent accounts – Roy MacLaren's history of the post of Canadian High Commissioner in Britain and Lorna Lloyd's broader study of the office of the High Commissioner generally in the Commonwealth – have added to our understanding.⁴⁶ Unfortunately, both dedicate only a chapter or so to the Second World War. Oddly, British historian Andrew Stewart's new book, which has asserted, correctly I believe, that the Second World War demonstrated how growing Dominion autonomy both contributed to Allied victory and fractured imperial ties, is based on only a cursory examination of Canadian and/or other Dominion primary sources.⁴⁷

If we are still waiting for the authoritative account of Canada-UK war-time relations, we can hope that it might cover other key subjects requiring

more elucidation. We need to know more about British reactions to Canada's growing ties with the United States, beginning with the Ogdensburg Pact of August 1940 and its creation of the Permanent Joint Board of Defence (PJBD). Both Dominions Secretary Lord Cranborne and Prime Minister Winston Churchill disliked the deal. Churchill, in fact, in August 1940, icily informed King – King was defending the deal on the grounds that it allowed Canada to send more aid to Britain – that if Germany could not best his nation, “all these transactions will be judged in a mood different to that while the issue still stands in the balance.”⁴⁸ We need a better understanding of British concerns about how Canadian-American cooperation during the war could contribute to postwar problems over military bases, aviation agreements and trade, etc. We know the broad outlines thanks to Malcolm MacDonald's famous intervention in 1942-1943 with King about American military activities in northwest Canada, but the internal debate among British officials and policy makers both during and after the conflict's end remains opaque.

Canada's multi-faceted relationship with the United States also is strangely unexplored. As far as I know, only two monographs are wholly dedicated to the origins and subsequent workings of the Canada-US security relationship that emerged with the establishment of the PJBD in 1940. The first is Colonel Stanley W. Dziuban's *Military Relations Between the United States and Canada 1939-1945*. The other is my own study, *Franklin Roosevelt and the Origins of the Canadian-American Security Alliance, 1933-1945*.⁴⁹ Dziuban's volume, part of the famed and lengthy US Army Green Book official history series, remains the only major study that has attempted to deal with the sweeping scope of Canada-US military cooperation. While generally sound in its analysis, the book, based primarily on American sources, came out in 1959 and is very weak in Canadian primary sources. My book, in turn, is much stronger for the period from 1934-1940 than what comes after, in part because its focus was Roosevelt's keen interest in hemispheric security, an interest that waned considerably, for obvious reasons, when Japan attacked Pearl Harbor in December 1941. Other shorter pieces have looked at the PJBD, notably essays by Granatstein, David Beatty, and a chapter in another Green Book volume.⁵⁰ All roughly have agreed about the rationale behind Roosevelt's advocacy for the PJBD, save for American historian Fred Pollock who has claimed that FDR plumped for the deal with Canada only to ensure that the Royal Navy, if Britain fell, would land in American hands rather than being handed over to Germany. Once Britain survived 1940 and that dire option was no longer likely, FDR quickly lost interest in his continental security creation.⁵¹ What is absent, however, is an up to date ac-

count of how the PJBD went about its business. We have only David Beatty's dated 1969 thesis from Michigan State University which lacked access to so many key document collections that are freely available now.⁵² Another defence-related body that must be studied is the Canadian Joint Staff Mission (CJSM). Formed in 1942 despite American and British objections, the CJSM, designed to interact with the many agencies connected to the newly formed Anglo-American Combined Chiefs and to perhaps gain Canada a seat on the Combined Chiefs, was a logical result of Wrong's functionalism. Canada did not break the Anglo-American Combined Chiefs monopoly (no country did), and its attempts to get seats on many of the reporting bodies also enjoyed rather little success. But we need a better understanding of how the CJSM, led ably by General Pope until 1944 (Pope gained the trust of British and American functionaries), functioned, how it related to the British Joint Staff Mission (which had opposed the CJSM's creation) and how it dealt with numerous American planning bodies. Ultimately, we must determine if there had been a real chance, perhaps squandered as Reid and Wrong have claimed to widen Canadian influence in Allied strategy-making and planning bodies in 1942-1943.

Indeed, so very little is known about how Canada's war effort was viewed by US policy makers, politicians, the media, and the American public while the conflict was ongoing. In 2009 journalist Chantal Allan's book, *Bomb Canada and Other Unkind Remarks in the American Media*, outlined how American newspapers and then television have portrayed and judged Canada, Canadians, and Canadian policies since the nineteenth century. Though the book makes for interesting reading, it says nothing about either of the World Wars, an odd omission indeed.⁵³ In March 1942, the US Coordinator of Information (the precursor to the Office of Strategic Services, or OSS) warned that growing Canadian discontent since December 1941 and an American propensity to overlook or to criticize the Dominion's war effort threatened to make bilateral relations "less cordial than they have been."⁵⁴ The OSS studied Canada and Canadian attitudes throughout the war, reports that remain obscure. Canadian military manpower policy was a subject of some concern in the United States, especially when a Canadian Army proposal to shrink its home defence elements to allow for the buttressing of its overseas forces in late 1943 engendered a brief but hostile reaction in American newspapers and in Congress, the Canadian announcement having come just as Congress was engaged in a bitter debate about the need to draft married men and 18 year olds. There are numerous references in the official records of the Department of External Affairs regarding allega-

tions that King was responsible for a lackluster effort to properly publicize Canada's vast wartime effort in the United States, but this subject too has not been dealt with well.

A great PhD thesis could be done about J.P. Moffat's tenure as the US Minister in Canada from 1940-43. Moffat, who left an extensive set of records at Harvard University, not to mention the massive State Department collections at the National Archives and Records Administration in Washington DC, was personally chosen by FDR to take up that job in the Spring of 1940 as Germany's military was slashing its way through Allied forces in Western Europe. That was an interesting choice for Moffat, described by the American press as "one of our crack diplomats,"⁵⁵ was a notorious Anglophobe who opposed American entry into the war in 1940. Nor do we know much about how the US military, after doing so much in northwest Canada during the war with the Alaska Highway, the Northwest Staging Route, and the Canol Pipeline, viewed Canadian-American security cooperation in the postwar period. By 1943, Escott Reid feared that the US was building a Maginot Line in the Canadian North to deal with an impending postwar Soviet threat.⁵⁶ Were US officials thinking about this contingency too prior to the war's end, or did such fears more fully develop later once the Cold War confrontation with the Soviets had grown far more frigid? Someone needs to make this clear.

The time is all too ripe for the many studies that I have recommended above. The passage of time has removed almost all of the official archival impediments that had blocked access to key record groups and manuscript collections in the past (unless one wishes to study connections between the British Royal Family and Nazi Germany – access to those papers will be restricted for many more decades). So unless the historical profession succumbs completely to the absurd post-modernist complaint about the "tyranny of archives" ruining academic inquiry, we should hope to see soon some good answers to the questions posed herein.

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The Acid Test of Sovereignty: Canada, the United States, and the Command of Control of Combined Forces for Continental Defence, 1940-1945

Richard Goette

Introduction

In 1941, Andrew McNaughton, Canada's top general and future Minister of National Defence, noted that "the acid test of sovereignty is the control of the armed forces."¹ After a careful examination of the Canadian-American command and control relationship for continental defence during the Second World War, this paper elaborates on McNaughton's statement. It demonstrates that the key issue was not control but *command* – that command over one's armed forces in one's territory was the central quality of a sovereign state and the "acid test of sovereignty." This argument is in fact representative of a maxim that remains a fundamental facet of Canadian armed forces command and control culture and tradition: always to retain command when co-operating with other nations' armed forces in continental defence, thereby ensuring Canadian sovereignty.² Indeed, as this chapter will demonstrate, throughout the Second World War Canadian military authorities worked hard to retain national command and operational command of Canadian forces when operating with American forces in the defence of North America, and this proved to be an effective means to safeguard Canadian sovereignty.

Conceptual Approaches to Sovereignty

This paper challenges a number of existing concepts of sovereignty. Rather than focusing on the "political" approach to sovereignty championed by Canadian Government civil servants and especially those of the Department of External Affairs, this paper focuses on the "functional", or military service, interpretation of sovereignty. The External Affairs perspective places emphasis on the "political" aspects of the Canada-U.S. continental defence relationship, with particular focus on diplomatic procedure and the desire for greater government consultation at the political

(strategic) level. The functional perspective, on the other hand, focuses on the purely military or “functional” aspects of the Canada-U.S. continental defence relationship, and in particular the efforts of officers from the two nations to ensure effective coordination of forces at the operational level in order to efficiently accomplish the military task of defending North America from attack. Here, the issue of command and control took centre stage, as Canadian officers had to try to find a balance between effective combined command and control arrangements with the Americans, while at the same time ensuring that Canadian forces remained under Canadian command so as to safeguard sovereignty.³

In undertaking a functional approach, Canadian officers were also able to avoid a “defence against help” situation with the United States. Articulated first by Norwegian academic Nils Ørvik in 1973 as a security “strategy for small states,” “defence against help” dictated that a country had to establish and maintain military credibility if it was to avoid unwanted “help” from its larger neighbours.⁴ In a Canadian context, the concept stresses the requirement of Canada to maintain a credible level of defensive capabilities for fear of the United States losing confidence in Canada’s ability to defend itself. This scenario could prompt an American usurpation of Canadian sovereignty by taking independent unilateral action in Canadian territory, waters, or airspace in order to protect U.S. security and defence interests.⁵ Therefore, according to the concept of “defence against help,” not only were Canada’s enemies a threat to Canadian security and sovereignty, but so too was its closest ally, the United States.

However, the Canadian military had, since 1940, positively asserted Canadian sovereignty with its attitude towards the continental defence relationship with the United States. Instead of maintaining a belligerent approach to American defence concerns, the Canadian military advocated taking an active role in the overall Canada-U.S. continental defence relationship by coordinating with its southern neighbour to organize effective and efficient bilateral command and control arrangements. Rather than “defence against help” this was indicative of a more positive “piece of the action” approach to the Canada-U.S. continental defence command and control relationship, a concept best articulated by P. Whitney Lackenbauer in “From ‘Defence Against Help’ to ‘A Piece of the Action’: The Canadian Sovereignty and Security Paradox Revisited” (2000). Lackenbauer posits that Canada’s conscious decision to secure a proverbial “piece of the action” by actively participating in continental defence efforts with the United States enabled the country to protect its sovereignty from American intervention.⁶

This paper adopts Lackenbauer's "piece of the action" argument. It does so by stressing that, despite the overwhelming power of the United States, by taking an active role in arranging an effective continental defence command and control relationship with the United States, while at the same time ensuring that Canadian forces did not come under American command, Canada was able to avoid a "defence against help" situation with the United States, maintain Canadian sovereignty, and provide effective defence for the continent.

National Command: A Service Prerogative

Before delving into the historical account of Canada-U.S. combined command and control relations during the Second World War, it is first necessary to discuss the principles of national command and operational command. One of the main characteristics of the Canada-U.S. Second World War continental defence relationship was the exclusion of administration and discipline over Canadian forces in bilateral command and control arrangements.⁷ Responsibility for such matters was not inherent in operational-level command and control authority but instead remained a national prerogative as part of the "national command" that Canada's civilian government maintained over Canadian forces through the service chiefs of staff—a practice that has continued to this day. During the Second World War, the national authority was the Canadian Chiefs of Staff Committee, consisting of the service chiefs of the army, navy and air force. All aspects of national command, which included authority over the assignment and original composition of forces, logistics, and administration and discipline, were therefore service prerogatives. These powers could not be assigned to an operational commander from a foreign nation, meaning that the retention of national command in combined command and control arrangements was an effective guarantee of Canadian sovereignty.⁸ There was, therefore, an important distinction between command and control authority exercised at the operational level by Canadian or foreign commanders, and at the strategic level by national headquarters in Ottawa.

The key concern was operational command of Canadian forces, and here again Canadian officers were successful during the Second World War at ensuring that operational command of Canada's forces remained in Canadian hands. Operational command, as the term denotes, is focused on actual operations; that is, the task at hand and how to utilize the means allocated to accomplish it. It did not include authority over administration or logistics, and its focus was on the ability of a commander to assign missions

and deploy or reassign forces.⁹ A service chief delegated operational command to his service's operational-level commanders. However, he could also grant operational command (or operational control) to a commander from a different service for joint operations or, if necessary, to a foreign officer in command of bilateral or multilateral forces.¹⁰ During the Second World War, Canadian officers were careful to avoid having Canadian forces come under U.S. strategic direction or unity of command, both of which embodied the same command and control authority as the modern principle of operational command.

The Beginning of the Canada-U.S. Continental Defence Relationship and the 1940 "Black Plan"

After the shocking defeat of France in 1940, the United States became alarmed by the growing German threat to North America and sought to make arrangements with Canada to coordinate continental defence. This endeavour led Prime Minister William Lyon Mackenzie King and President Franklin Roosevelt to conclude the Ogdensburg Agreement and establish the Permanent Joint Board on Defence (PJBD) in August 1940. One of the initial tasks assigned to the PJBD was to produce the first ever bilateral plans for the defence of North America, and the command and control of combined Canadian-American forces quickly became a central issue.

Canada was reluctant to surrender part of its sovereignty and command and control of its forces to American commanders. However, the United States, as U.S. Army official historian Stanley W. Dziuban has explained, stood staunchly by its "unwillingness to leave in the hands of another power the defense of continuous border areas whose adequate defense was vital to the security of the United States."¹¹ While Canada championed its joint committee cooperation system of command and control, the U.S. desired to implement its unity of command system.¹² These unique joint command and control cultures often conflicted, but in the end a compromise between the two systems was struck. Through this compromise, Canada was able successfully to resist American pressure to place Canadian forces under U.S. command, thereby retaining national command and operational command and ensuring Canada's sovereignty.

During the initial PJBD defence discussions in the summer of 1940, American officers felt that they held a definite advantage in securing favourable command and control arrangements. They observed that Canadian defence measures in North America were alarmingly weak because of the comparatively small size of Canada's military, and the fact that the bulk of

its forces were deployed overseas to protect Britain. Because this strategic situation would make Canada reliant on the U.S. for continental defence, the American military expected to dominate the defence relationship.¹³

The PJBD soon began working on a joint defence plan, which it released on 10 October 1940. It was officially called the Joint Canadian-United States Basic Defense Plan–1940, but it was commonly known as the “Black Plan” because it “postulated a German victory over Britain, the disappearance of the Royal Navy as an effective fighting force, and a concerted Axis effort against North America.”¹⁴ The plan provided for defence responsibilities in territorial waters and land areas on the lines of national sovereignty: Canada would protect Canadian territory and the United States would protect American territory. Responsibility for the defence of Newfoundland, however, was unclear, especially after the U.S.-British Destroyers-for-Bases Deal in September 1940 meant that Canadian and American forces would now be stationed there to defend the British colony.¹⁵ The PJBD sought to address this issue when they met to discuss specific command and control arrangements for the Black Plan during the following winter.

Because the Black Plan envisaged the defeat of Britain – which would include the large number of Canadian forces overseas defending the island nation – and a major assault on North America, Canadian planners understood that their only hope of survival hinged on assistance from the United States. Therefore, in this unfavourable scenario, Canada was willing to grant the United States greater command and control authority over Canadian forces. Based on recommendations from the Canadian Section PJBD and the Chiefs of Staff Committee, the government agreed with the American proposal that the U.S. Army Chief of Staff could exercise “strategic direction” (the term “strategical direction” was also used) over Canadian land and air forces. At the operational level, this meant the exercise of operational command by the United States over all military forces in Canada and Newfoundland.¹⁶ However, this command and control authority was subject to Canadian consent and consultation, as there was a specific provision in the Black Plan that gave the individual Canadian service chiefs or a Canadian operational commander “the right to appeal to the Canadian government if, in his opinion, Canadian national interests are imperilled by the strategic directives received from the United States.”¹⁷

To summarize, in the event of an Axis assault on North America, Canada recognized that the United States would be the preeminent power and should have strategic direction over forces defending the continent in the Black Plan. Nonetheless, by making this strategic direction authority sub-

ject to Canadian consultation and having a provision for the right to refer to higher authority, the Canadian government also ensured that it would have a say in the deployment and movement of its forces.

Mutual Cooperation or Unity of Command: ABC-22

Nonetheless, by early 1941 it was becoming more probable that Britain was going to survive and continue the fight against the Axis. With the English Channel, not the Western Atlantic, as the first line of defence, Canadian PJBD members announced to their American counterparts that the Black Plan was out of date and that a new plan for 1941 "should be drawn up at once."¹⁸ The Americans agreed, and work began on the new plan, which later became known as Plan 2 or ABC-22 (both terms will be used). Unlike the Black Plan (which subsequently became known as Plan 1), Plan 2 envisaged the survival of Britain and the entry of the United States into the war *alongside* the British Commonwealth, a scenario which was becoming much more likely by the spring of 1941.¹⁹ Canadian planners felt that, in this more strategically favourable climate, Canada had more leverage in its command and control discussions with the Americans. In particular, the Canadian PJBD members believed that they did not have to accept American strategic direction. This stance led to several disagreements with American planners.

In the resulting discussions, U.S. planners advocated for the same American strategic direction over all Canadian and U.S. forces as in the Black Plan. The Canadians, conversely, argued that the improved strategic situation did not warrant it, and instead insisted that the Canada-U.S. command and control relationship should be based on the principle of cooperation.²⁰ The American members, although admitting that cooperation was "possible," maintained that this command and control principle "is definitely wrong, inconsistent with Plan No. 1 and invites confliction [sic], delay and uncertainty."²¹ It was, therefore, not surprising that the two sides were unable to find a middle ground and an impasse resulted. For the moment, they essentially agreed to disagree on the issue of command and control, deciding that it would be best to seek further advice from their respective Chiefs of Staff and governments.²² Nonetheless, because the American planners admitted that cooperation was at least a possibility, Canadian PJBD service members were encouraged to push harder to make it the basis of the command and control arrangements for ABC-22.

In opposing American strategic direction in Plan 2, the Canadian PJBD members had the full support of the Chiefs of Staff Committee, who were "most strongly against the acceptance by Canada of any proposal giving the

United States unqualified strategic control of Canadian Armed Forces" for ABC-22.²³ Their main concern was that American strategic direction would potentially allow the United States to re-distribute Canadian forces to other areas of North America, which was a national command responsibility. In particular, the Chiefs feared that this authority could possibly lead American commanders to remove forces from Canadian territory without Canadian consent, in order to provide added protection to their own vital points. This would have been a significant blow to Canadian sovereignty.²⁴

The Chiefs of Staff Committee instead endorsed a suggestion by the Royal Canadian Navy (RCN) member of the PJBD, Captain H.E. Reid. "Rastus" Reid, who would later become the RCN's Chief of the Naval Staff, recommended that the U.S. retain strategic direction over its forces in its own territory and Canada retain strategic direction over its forces in Canada and Newfoundland. When Canadian-American forces operated together, the command and control relationship between the two nations' forces should be "the same mutual co-operation which has been so evident between the U.K. and Canadian forces now operating in the Atlantic area."²⁵ The Cabinet War Committee concurred, and officially sanctioned the Canadian PJBD Section's efforts to resist U.S. strategic direction and come to a more agreeable command and control solution.²⁶

The resulting 19th Meeting of the PJBD in Washington in late May was the most strained in the history of the Canadian-American body. It took place in the Federal Reserve Board building beginning at 9am and lasted well into the night. It was a hot day, but the air conditioning system was shut off after 6pm. The Canadians suspected that this had been done on purpose in order to "sweat out" an agreement on command and control more favourable to the United States. The American planners stressed that U.S. strategic direction, or as they now also termed it "unity of command" (they used both terms interchangeably), was "essential in war" and therefore necessary for ABC-22. To back up this position, they cited the precedent of Marshal Ferdinand Foch's exercise of unity of command over all Allied armies on the Western Front in 1918 and how the U.S military felt that it was a crucial factor in Allied victory in the First World War. Brigadier Maurice Pope, the Canadian Army's Assistant Chief of the General Staff (ACGS) and that service's member of the PJBD, disagreed with this line of reasoning. He argued that the 350 divisions on the Western Front and the strategic setting in 1918 were "totally different to a situation when there was a war in the Western Hemisphere and our joint coastlines exposed only to occasional hit and run raids."²⁷ Put simply, the strategic situation upon which ABC-22 was

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based – British survival and no major Axis assault on North America – was not serious enough to warrant U.S. strategic direction or unity of command over Canadian forces. Pope’s stance had the desired effect, and the proposal for U.S. unity of command was withdrawn.²⁸ Instead, the two sides came to a compromise.

On 28 July 1941, the Board released its final draft of ABC-22.²⁹ The command and control provisions in the new bilateral North American defence plan were a significant victory for Canadian planners. ABC-22 outlined that each nation would retain strategic direction and command of its own forces. The combined Canadian-U.S. military effort was to be based on the command and control principle of “mutual cooperation” and the forces of each nation were required, “to their utmost capacity, support the appropriate forces of the other nation.” In addition, to appease the Americans, ABC-22 also included a provision for the exercise of unity of command over Canadian and American forces in an emergency situation, to be implemented in the following circumstances:

- a) When agreed upon by the Chiefs of Staff concerned; or
- b) When the commanders of the Canadian and United States forces concerned agree that the situation requires the exercise of unity of command, and further agree as to the Service that shall exercise such command. All such mutual agreements shall be subject to confirmation by the Chiefs of Staff concerned, but this provision shall not prevent the immediate establishment of unity of command in cases of an emergency.³⁰

The final definition of unity of command in ABC-22 was as follows:

Unity of command, when established, vests in one commander the

- responsibility and authority to co-ordinate the operations of the participating forces of both nations by the setting up of task forces, the assignment of
- tasks, the designation of objectives, and the exercise of such co-ordinating
- control as the commander deems necessary to ensure the success of the operations.

Unity of command does not authorize a commander exercising it control the administration and discipline of the forces of the na-

tion of which he is not an officer, nor to issue any instructions to such forces beyond those necessary for effective co-ordination.³¹

This definition of unity of command was similar to the modern definition of "operational command."³² For ABC-22, this meant that unity of command in a theatre entailed vesting operational command of both joint *and* combined forces in one single operational commander.

Furthermore, by specifying that unity of command did not include authority over administration and discipline, ABC-22 also ensured that these responsibilities remained a service prerogative under the national command exercised by the respective country's chiefs of staff. The command and control provisions in the new plan were, therefore, a compromise between the Canadian joint committee cooperation system and the American unity of command system. It ensured that national command would be retained by each nation's chiefs of staff. Although the plan contained provisions for unity of command in an emergency, or when agreed to by the Canadian and American chiefs of staff, cooperation was the main principle upon which the command and control relationship between Canadian and American operational commanders would be based in the event of U.S. entry into the war.

The American planners were never fully satisfied with the command and control arrangements in ABC-22. The U.S. Army War Plans Division in particular felt that that "mutual cooperation is an ineffective method of coordination of military forces" and that the plan was therefore "considered defective in its provisions relative to command arrangements."³³ However, although senior U.S. Army PJBD member Lieutenant-General Stanley Embick agreed with his War Plans Division colleagues, given the difficulties already experienced in negotiating the command and control arrangements for Plan 2, he concluded that the arrangements in ABC-22 "probably represent the best compromise possible under present conditions."³⁴ The United States Secretary of the Navy approved ABC-22 on 16 August and the Secretary of War did the same two days later. President Roosevelt's approval came on the 29th of that month.³⁵ The Canadian Chiefs of Staff submitted their endorsement of ABC-22 to the government on 30 September, and the Canadian Government gave its official approval to the plan on 15 October.³⁶ In the end, ABC-22 was appended to existing American and Canadian defence plans and distributed to the relevant operational commanders. It was only to be put into effect upon the entry of the United States into the War.³⁷ This, of course, proved to be a short time indeed, as Japanese carrier aircraft launched a surprise attack on Pearl Harbor on 7 December 1941.

At the Operational Level

The arrival of U.S. troops and aircraft in Newfoundland in early 1941 marked the first time that Canadian and American commanders were tasked to coordinate their forces at the operational level in a combined effort to defend the continent from attack. Several significant differences of opinion arose between the Canadian and American militaries regarding what the command and control relationship between their forces should be. Different perceptions in Canada and the United States of how the defence of Newfoundland fit into the overall defence scheme for North America was a crucial factor in the ongoing debate on command and control. The Americans saw Newfoundland as a separate entity outside of the continental United States, and, as the larger partner in the new Canada-U.S. alliance, they naturally desired that one of their commanders be allowed to exercise unity of command there. The Canadians, on the other hand, viewed Newfoundland as an integral part of the overall defence of eastern Canada. Feeling that their special interests in the British colony were paramount – and the fact that they had deployed to the colony first at the behest of both the Newfoundland and British governments – the Canadian military leadership felt that responsibility for the defence of Newfoundland and the command and control system that should be implemented for this purpose should be Canada's prerogative and should thus be based on mutual cooperation.³⁸

The situation at the operational level in Newfoundland was clarified somewhat with the approval of ABC-22 by the Canadian and U.S. governments in the autumn of 1941. Nevertheless, ambiguities and disagreements regarding the command and control issue persisted in Newfoundland throughout the last months of 1941. This situation was due largely to the fact that ABC-22 was not in effect because the United States was not yet officially in the war, and also because of the arrival of a new U.S. Army officer in St. John's.

Due to the growing number of U.S. forces in Newfoundland and the increased USAAF operations in the defence of maritime trade by the autumn of 1941, the U.S. Army decided that it was time to appoint a general-ranking officer to the colony. In October 1941, Major-General Gerald C. Brant arrived in St. John's to take over responsibility for U.S. Army forces in the colony as the new Commanding General, Newfoundland Base Command.³⁹ Brant was brash and aggressive, and his personality did not make him amenable to accepting mutual cooperation as a basis for command and control of combined forces in Newfoundland. A former classmate of U.S. Army Chief of Staff General Douglas MacArthur, Major-General Brant was, in the words

of Canadian official historian W.A.B. Douglas, “a soldier moulded in the tradition of the old army.”⁴⁰ Moreover, Brant was a staunch advocate of unity of command.⁴¹ Immediately upon arriving in Newfoundland, he began constantly to exert pressure on the Canadians to establish unity of command – exercised by himself – in the colony, and this attitude only served to alienate him from the Canadian operational-level commanders.⁴² Brant’s efforts towards achieving unity of command, and Canada’s successful resistance to them, became a recurring theme for the next several months.

The Japanese attack on Pearl Harbor on 7 December 1941 brought the issue of command and control of combined Canadian-American continental defence forces to the forefront. Previously, with Canada fully engaged in the war and the U.S. officially neutral, it was unclear what the actual command and control relationship between the two countries’ military forces was. However, now with the U.S. as belligerents and ABC-22 officially placed into effect there was no question at all: mutual cooperation would be the means by which Canadian and American commanders would coordinate their forces. Nevertheless, disagreements between the two nations persisted about whether this practice should be continued or the provision in ABC-22 for unity of command should be implemented.

These differences of opinion largely centred on conflicting interpretations of the seriousness of the actual threat that their combined forces faced. The Americans were devastated by the scale and surprise of the Japanese attack, and they were anxious to take all of the defensive precautions they could now that they were belligerents in the war, including implementing unity of command on both coasts.⁴³ The Canadian military leadership, however, felt that the strategic threat was still negligible. They predicted, correctly, that in the Pacific the Japanese would focus their offensive to the southeast, not the northeast towards the North American Pacific coast, and that Germany, still heavily engaged in the Soviet Union, would not risk an attack on the east coast. Under these circumstances, the Chiefs of Staff Committee concluded that a command and control relationship between Canadian and American forces in Newfoundland and on the Pacific coast based on mutual cooperation, as provided for in ABC-22, was satisfactory and that unity of command under an American officer on either coast was not necessary.⁴⁴

For the Pacific coast, it took a direct approach with American military leadership in Washington to secure reassurance that the current forms and scales of attack did not require unity of command. After the Pearl Harbor attack, the United States Section of the PJBD immediately pressed Canada to place all of its military forces in British Columbia under U.S. unity of

command. American PJBD Chairman Fiorello LaGuardia outlined the U.S. position in a 2 January letter to Canadian Chairman O.M. Biggar. He argued that British Columbia “geographically was an enclave” within the newly-formed U.S. Western Theatre of Operations, which stretched from Southern California up to and including Alaska. Stressing that the Puget Sound-southern British Columbia area in particular was of crucial strategic importance and therefore “cannot be most effectively defended under the control of several commanders,” LaGuardia formally requested that the Canadian and U.S. governments implement the provision for unity of command in ABC-22 by placing Canadian army and air forces in British Columbia under the “Supreme Command” of the U.S. Army commander, Lieutenant-General John L. Dewitt.⁴⁵ LaGuardia ended his letter to Biggar by stressing that unity of command under Dewitt was “a wise precautionary measure, in advance of the occurrence of an actual attack.”⁴⁶

As Galen Perras has noted, LaGuardia’s request “met a Canadian stone wall.”⁴⁷ After meeting on 3 January, the Canadian PJBD Section came to the unanimous conclusion that “no case whatever had been made for the institution of a U.S. unity of command over Canadian Army and Air Forces.”⁴⁸ Once again, the U.S. request for unity of command was representative of a fundamental Canada-U.S. disagreement on anticipated enemy intentions. The Americans, “as usual,” did not include any updated forms or scales of attack to justify their position. The strategic threat to the west coast was in fact “precisely the situation that was contemplated last Spring when ABC-22 was drafted.”⁴⁹ Since the Canadians had then held out for mutual cooperation, there was thus no new reason why they should not again resist this new attempt by the Americans to establish unity of command.⁵⁰

At the time, the Canadian Chiefs of Staff were in Washington for discussions with the Americans and the British. They decided to take advantage of their presence in the U.S. capitol to resolve the command and control issue by speaking directly to their American counterparts, USN Chief of Naval Operations (CNO) Admiral Harold Stark and U.S. Army Chief of Staff General George Marshall.⁵¹ Although unknown to the Canadian Chiefs of Staff at the time, Admiral Stark had in fact been advocating to General Marshall that mutual cooperation, *not* unity of command, should be the primary command and control principle upon which American *defensive* joint operations should be based. Specifically, although Stark felt that unity of command may be necessary for mixed task forces for offensive operations, he believed that mutual cooperation was better suited for defensive ones.⁵² This opinion proved to be beneficial to the Canadian stance on bilateral Canada-

U.S. command and control. In Washington, the Canadian Chiefs asked Stark and Marshall the specific reasons why, in their view, a change in the Canada-U.S. command and control relationship was necessary. The response was very revealing. The U.S. Chiefs of Staff agreed that the threat was no more than sporadic hit-and-run raids and “stated unequivocally that they did not subscribe to the necessity of Unified Command either in Newfoundland or on the West Coast.”⁵³

This *official* U.S. military opinion not only satisfied the Canadian Chiefs of Staff Committee, but also convinced them of the effectiveness of a direct approach to the U.S. Chiefs of Staff. Accordingly, the Canadian military leadership announced that any further deliberation and decisions regarding the Canada-U.S. command and control relationship would no longer come under the purview of the PJBD, but instead would be “entirely a matter of the Chiefs of Staff Committee.”⁵⁴ Only *if* the U.S. Chiefs of Staff directly approached the Canadian Chiefs of Staff Committee about implementing the unity of command provision in ABC-22 – which appeared unlikely – would the Canadian military leadership consider the matter again. Therefore, although members of the U.S. Section PJBD tried at various times during the winter and spring of 1942 to convince their Canadian counterparts of the need for unity of command on the west coast, because no proof was given that mutual cooperation had broken down and no formal request came from the U.S. Chiefs of Staff (by March 1942 the Joint Chiefs of Staff, or JCS), the Canadian Chiefs of Staff Committee refused to contemplate these requests.⁵⁵

On the east coast, the relationships between the Canadian and American operational-level commanders also proved crucial. In particular, the relationship between Major-General Brant and the Canadian commanders in Newfoundland continued to be a rocky one. Brant had a particularly difficult relationship with the RCAF commander in Newfoundland, Air Commodore C.M. “Black Mike” McEwen. Although Brant was a USAAF officer, he was not an advocate for an independent air force in the United States; unlike most airmen at the time, he felt that the air services should remain under the U.S. Army.⁵⁶ This factor, added to Brant’s brash and aggressive personality, meant that the commander of the U.S. Army Newfoundland Base Command was not enamoured with the upstart young Canadian airman.⁵⁷

The friction between Brant and McEwen spilled over during a meeting in St. John’s in June 1942. When the Newfoundland Base Commander refused to adhere to RCAF air traffic control and identification regulations and then proceeded to mock the Canadian air service, McEwen and the Canadian Army commander in Newfoundland, Major-General L.R. Page, issued him

a thinly-veiled threat to shoot down any USAAF aircraft that did not adhere to the regulations. Brant retorted that he was willing to take that risk and stormed out of the meeting.⁵⁸ Unfortunately, this clash of personalities had a direct result on the command and control situation in Newfoundland; as the RCN commander in Newfoundland, Rear-Admiral L.W. Murray, noted at the time, "the system known as cooperation, which we favour, is very difficult to achieve with an officer of this type commanding one of the five services involved."⁵⁹

Brant was reprimanded by his superior for the incident and later apologized to the Canadians for his behaviour. The Canadian Chiefs of Staff Committee accepted the apology and considered the matter closed.⁶⁰ Thereafter, relations between the Newfoundland Base Commander and the Canadians were "extremely good" and mutual cooperation proved effective for continental defence coordination. Brant did not bring forth the unity of command issue again; however, he never did feel comfortable with mutual cooperation, feeling that it was defective. Moreover, he expressed privately his opinion that the Canadian forces in Newfoundland were "negligible" and that in the event of an enemy attack the main defensive effort would be handled by the U.S. Army with himself in command.⁶¹ Fortunately, there was no enemy attack on Newfoundland during the war to test whether or not Brant would adhere to official policy or his own personal views on the exercise of unity of command. As a result, mutual cooperation as provided for in ABC-22 remained the command and control principle in effect between Canadian and American continental defence forces throughout the remainder of the Second World War.

Conclusion

During the Second World War, Canada's ability to retain both national command and operational command of its forces in its combined command and control relationship with the United States was indeed the "acid test of sovereignty." The Americans had hoped to utilize their own joint system of unity of command for combined Canada-U.S. continental defence command and control, but Canadian officers worked hard in negotiations with their allies for bilateral defence plans and in-theatre at the operational level to ensure that Canadian forces would not come under American command. Instead, they stressed that the strategic situation did not warrant unity of command, and remained steadfast throughout the war in their preference for mutual cooperation. As a consequence of this functional perspective that the Canadian military planners maintained regarding the military situation

as it applied to the Canada-U.S. continental defence command and control relationship, Canada was able to avoid a “defence against help” situation with the United States. Moreover, the retention by Canada of command of its forces for continental defence proved to be an effective safeguard of Canadian sovereignty throughout the Second World War.

In the end, there were – fortunately – no enemy attacks on North America during the war (except the Aleutians – see note # 49) to determine whether or not mutual cooperation was an effective means of command and control to coordinate combined Canada-U.S. defensive operations. Nonetheless, mutual cooperation was put to the test in the Northwest Atlantic, where the two countries’ air forces worked together to coordinate their operations to defend Allied shipping from U-boat attacks. It failed this test and necessitated the implementation of the British system of operational control for combined Canada-U.S. maritime air power operations, a command and control principle that also ensured Canadian national command and operational command. This experience set important precedents for future Canada-U.S. continental defence command and control arrangements during the Cold War, but that is a story for another time.

Notes

- 1 C.P. Stacey, *Canada and the Age of Conflict, Vol. II* (Toronto: University of Toronto Press, 1984), 349.
- 2 Indeed, Allan English has noted that “command and control arrangements and practices are influenced by national and military culture and historical experience.” Allan English, *Command and Control of Canadian Aerospace Forces: Conceptual Foundations* (Ottawa: Her Majesty the Queen as represented by the Minister of National Defence, 2008), 37. For further discussion on Canadian military culture, see Allan English, *Understanding Military Culture: A Canadian Perspective* (Montreal and Kingston: McGill-Queen’s University Press, 2004).
- 3 This “functional” and “political” categorization has been gleaned from the following: Joseph Jockel, “Canada in NORAD, 1957-2007: A History,” Presentation given as a part of the Queen’s Centre for International Relations [hereafter QCIR] National Security Seminar Series, 24 January 2007; Joseph T. Jockel, *Canada in NORAD 1957-2007: A History* (Montreal and Kingston: McGill-Queen’s University Press, in association with The Queen’s Centre for International Relations and The Queen’s Defence Management Program, 2007), 3-4; Peter Haydon, *The 1962 Cuban Missile Crisis: Canadian Involvement Reconsidered* (Toronto: Canadian Institute of Strategic Studies, 1993), 77, 91-92; Stéphane Roussel, *The North American Democratic Peace: Absence of War and Security Institution-Building in Canada-US Relations, 1867-1958* (Kingston: McGill-Queen’s University Press, 2004), 211-212.
- 4 Ørvik explained the concept as follows: One credible objective for small states would be, while not attempting military resistance against a large neighbour, to persuade him that they are strong enough to defend themselves against any of the large neighbour’s potential enemies. This could help avoid the actual military presence of the great neighbour on one’s

- territory for reasons of military 'help' and assistance. Nils Ørvik, "Defence Against Help – A Strategy for Small States?," *Survival*, Volume 15, Number 5 (September-October 1973), 228; Nils Ørvik, "The Basic Issue in Canadian National Security: Defence Against Help/Defence to Help Others," *Canadian Defence Quarterly*, Volume 11, Number 1 (Summer 1981), 8-15. Quote from former. I am indebted to Whitney Lackenbauer for brining Ørvik's work on this concept to my attention. Lackenbauer also extensively discusses "defence against help" in the following publication: P. Whitney Lackenbauer, "From 'Defence Against Help' to 'A Piece of the Action': The Canadian Sovereignty and Security Paradox Revisited," University of Calgary Centre for Military and Strategic Studies (CMSS) Occasional Paper No. 1, May 2000.
- 5 Major Louis Grimshaw, "On Guard: A Perspective on the Roles and Functions of the Army in Canada," MA Thesis, War Studies, Royal Military College of Canada, 1989, 26-27, 47, 59-60; P. Whitney Lackenbauer, "Right and Honourable: Mackenzie King, Canadian-American Bilateral Relations, and Canadian Sovereignty in the Northwest, 1943-48," in John English, Kenneth McLaughlin and P. Whitney Lackenbauer, eds., *Mackenzie King: Citizenship and Community, Essays Marking the 125th Anniversary of the Birth of William Lyon Mackenzie King* (Toronto: Robin Brass Studio, 2002), 161; Ørvik, "The Basic Issue in Canadian National Security."; Donald Barry and Duane Bratt, "Defense Against Help: Explaining Canada-U.S. Security Relations," *The American Review of Canadian Studies*, Volume 38, Number 1 (Spring 2008), 63-89; Lackenbauer, "From 'Defence Against Help' to 'A Piece of the Action,'" 1-3. Lackenbauer adds (Ibid., 13) that "the concept of 'defence against help' was based upon a notion that Canada could not take a 'free ride' to security without fear of losing control of the disposition of its own resources, territory and airspace."
- 6 Lackenbauer, "From 'Defence Against Help' to 'A Piece of the Action,'" 5.
- 7 C.P. Stacey, *Arms, Men and Governments: The War Policies of Canada, 1939-1945* (Ottawa: Queen's Printer, 1970), 354.
- 8 Directorate of History and Heritage, Department of National Defence, Ottawa (DHH) 87/47, R.L. Raymont (Colonel), *The Evolution of the Structure of The Department of National Defence 1945-1968, Report of the Task Force on Review of Unification of the Canadian Armed Forces* (30 November 1979), 24 and Appendix A, 21; General Charles Foulkes, "The Complications of Continental Defence," in *Neighbors Taken for Granted: Canada and the United States*, Livingston T. Merchant, ed. (Toronto: Burns and MacEachern Limited, 1966), 108; Richard Goette, "Cross Border Differences of Opinion: Canadian and American Air Force Command and Control Practices and Common Efforts in the Defence of Newfoundland," Paper prepared for the Organization for the History of Canada Conference, "Canadian-American Relations: Do Borders Matter?," Ottawa Conference Centre, Ottawa, 13-16 May 2004, 2, 4-5; Richard Evan Goette, "The Struggle for a Joint Command and Control System in the Northwest Atlantic Theatre of Operations: A Study of the RCAF and RCN Trade Defence Efforts During the Battle of the Atlantic," (MA Thesis, Queen's University, 2002), 49-50, 121-124; Stacey, *Arms, Men, and Governments*, 354; Richard H. Gimblett, "Command in the Canadian Navy: An Historical Survey," *The Northern Mariner*, Volume XIV, Number 4 (October 2004), 45-46.
- 9 The modern definition of operational command is: "The authority granted to a commander to assign missions or tasks to subordinate commanders, to deploy units, to reassign forces and to retain or delegate OPCON [operational control] and/or tactical control (TACON) as may be deemed necessary. It does not of itself include responsibility for administration or logistics." Canada, Department of National Defence,

- Canadian Forces Operations*, B-GJ-005-300/FP-000, 15 August 2005, Chapter 2, Section I, Subsection 202.2b.
- 10 This was in fact the case for the RCAF's expeditionary experience during the Second World War and the Cold War. During 1939-1945, Canada relinquished operational command of overseas RCAF forces to Britain's Royal Air Force (RAF), and after 1945 placed the RCAF's No. 1 Air Division under NATO's Fourth Allied Tactical Air Force. English and Westrop, *Canadian Air Force Leadership and Command*, 23, 28.
 - 11 Stanley W. Dziuban, *United States Army in World War II Special Studies: Military Relations Between the United States and Canada, 1939-1945* (Washington: Office of the Chief of Military History, Department of the Army, 1959), 109.
 - 12 The Canadian joint committee cooperation system and the American unity of command system are discussed in Chapter Three of my forthcoming Queen's University doctoral dissertation.
 - 13 Galen Roger Perras, *Franklin Roosevelt and the Origins of the Canadian-American Security Alliance 1933-1945: Necessary, but Not Necessary Enough* (London: Praeger, 1998), 69, 71.
 - 14 Joint Canadian-United States Basic Defense Plan-1940, dated 10 October 1940, copy in PJBD Journals, Volume 1, DHH 82/196, File 1b; Douglas, *Creation of a National Air Force*, 383. Quote from latter.
 - 15 Dziuban, *Military Relations*, 110; Douglas, *Creation of a National Air Force*, 383; Samuel Elliot Morrison, *History of the United States Naval Operations in World War II, Volume II: The Battle of the Atlantic, September 1939-May 1943* (Boston: Little, Brown and Company, 1947), 68-69, 85; David MacKenzie, *Inside the Atlantic Triangle: Canada and the Entrance of Newfoundland into Confederation, 1939-1949* (Toronto: University of Toronto Press, 1986), 79, 81.
 - 16 Douglas, *Creation of a National Air Force*, 383-384; Dziuban, *Military Relations*, 115; Memorandum from Chiefs of Staff to Ministers of National Defence, 22 April 1941, Library and Archives Canada (hereafter LAC), Record Group (hereafter RG) 25, Vol. 5695, File 1-AL(s); Extract from Minutes of the Cabinet War Committee, 23 April 1941, LAC, RG 25, Vol. 2724, File HQS 5199-W-1; Stacey, *Arms, Men and Governments*, 349; Lieutenant-General Maurice Pope, *Soldiers and Politicians: The Memoirs of Lt.-Gen. Maurice A. Pope* (Toronto: University of Toronto Press, 1962), 163-164.
 - 17 "Permanent Joint Board on Defense – Second Report," n.d. [29 May 1941], United States National Archives and Records Administration, College Park, Maryland (NARA), RG 59, State Department Files, PJBD, Box # 8, File Correspondence of PJBD, January to June 1941.
 - 18 Stuart Memorandum, "J.D.B. Plans for 1941," 16 January 1941, DHH 112.11 (D1A) Volume 1; Appendix, "Report from Service Members on Progress Made in Carrying out Recommendations of the Board," attached to Minutes of the 14th Meeting of the PJBD, Montreal, 20 January 1941, PJBD Journals, Volume 1, DHH 82/196, File 1b. Quote from latter.
 - 19 As one Canadian strategic estimate noted, there was "no probability [of] a large scale attack on our shores"; all that could be expected were enemy "'tip-and-run' sea and air raids against ports and other military objectives in Newfoundland and Eastern Canada." Chiefs of Staff Committee Memo to Ministers of National Defence, "Brief Appreciation of the Situation as of 24th February 1941," 25 February 1941, Joint Staff Fonds, Chiefs of Staff Committee Papers, DHH 2002/17, Box 65, File 3.
 - 20 Memorandum, Colonel J.W. Anderson, Acting Assistant Chief of Staff, War Plans Division, to Lieutenant General S. Embick, Senior Army Member, PJBD,

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- “Joint Canada-United States Basic Defense Plan No. 2,” 7 April 1941, NARA, RG 165, WPD 4330-21; Memorandum by USN PJBD Member, “Strategic direction and command features for incorporation in Plan No. 2,” 17 April 1941, Queen’s University Archives, Kingston (QUA) C.G. Power Papers, A.Arch 2150, Box 69, File D2020; Pope to Crerar, 18 April 1941, RG 24, Volume 2427, Volume HQS 5199-W-B. See also Pope, *Soldiers and Politicians*, 164n.
- 21 Pope to Crerar, 18 April 1941, RG 24, Volume 2427, Volume HQS 5199-W-B; Lieutenant-Colonel Clayton Bissel, U.S. Army, Memorandum, “Control of United States-Canadian Military Forces,” 19 April 1941, QUA, Power Papers, A.Arch 2150, Box 69, File D2020.
 - 22 Bissel to Marshall, 21 April 1941, NARA, RG 165, WPD 4330-23.
 - 23 Chiefs of Staff Committee to Ministers of National Defence, 22 April 1941, Documents of the Cabinet War Committee, Volume V, LAC, RG 2, 7C, Volume 4, Microfilm # C-11789, copy at Canadian Forces College (CFC) Information Resource Centre (IRC), Toronto.
 - 24 *Ibid.*; Perras, *Necessary, but Not Necessary Enough*, 80. See also Crerar to Pope, 15 May 1941, DHH 112.11 (D1A) Volume 2.
 - 25 Chiefs of Staff Committee to Ministers of National Defence, 22 April 1941, Documents of the Cabinet War Committee, Volume V, LAC, RG 2, 7C, Volume 4, Microfilm # C-11789, copy at CFC IRC; Reid Memorandum to Nelles, “Strategic Direction of Canadian and United States Naval Forces Operating in Coastal Waters of Canada & Newfoundland,” 19 April 1941, LAC, RG 24, Vol. 2724, File HQS 5199-W-1-B Part 1. Quote from latter. The origins of the “mutual cooperation” relationship with the British can be traced to a precedent established before the war by the inter-war Canadian chiefs of staff. As M.V. Bezeau has remarked, since the inter-war period the leaders of Canada’s three military services were “able to resist centralized control and insist on mutual and voluntary cooperation as the only basis for joint planning and command.” At the beginning of the Second World War, this practice was extended to combined command and control arrangements with other countries when Prime Minister William Lyon Mackenzie King’s official Order-in-Council of 17 November 1939 officially established mutual cooperation as the main command and control principle under which Canadian forces would operate. In doing this, the Prime Minister had set an important precedent: Canada would resist having its forces commanded by an outside service. Captain M.V. Bezeau, “The Role and Organization of Canadian Military Staffs,” MA Thesis, Royal Military College of Canada, 1978, 68; Order in Council by the Canadian Government, 17 November 1939, reproduced in David R. Murray, ed., *Documents on Canadian External Relations, Volume 7, 1939-1941, Part I* (Ottawa: Information Canada, 1974), 842; Douglas, Sarty, Whitby, et al., *No Higher Purpose*, 56-57; C.P. Stacey, *Arms, Men and Government: the War Policies of Canada, 1939-1945*, (Ottawa: Queen’s Printer, 1970), 309.
 - 26 Chiefs of Staff Committee to Ministers of National Defence, 22 April 1941 and Minutes of the 78th Meeting of the Cabinet War Committee, 23 April 1941, Documents of the Cabinet War Committee, Volume V, LAC, RG 2, 7C, Volume 4, Microfilm # C-11789, copy at CFC IRC.
 - 27 Pope, *Soldiers and Politicians*, 164-166; 19th Meeting of the PJBD, Washington, 28-29 May 1941, PJBD Journals, Volume 2, DHH 82/196, File 2; Pope to Stacey, 25 March 1954, LAC, RG 24, Volume 20,317, File 951.001 (D1); Memorandum from ACGS for CGS, “Meeting of Permanent Joint Board on Defence, Washington, 28-29 May 1941,” 31 May 1941, DHH 112.11 (D1A) Volume 2; Stacey, *Arms, Men and Governments*, 352. Quote from latter.

- 28 Pope, *Soldiers and Politicians*, 166; 19th Meeting of the PJBD, Washington, 28-29 May 1941, PJBD Journals, Volume 2, DHH 82/196, File 2. Quote from latter.
- 29 Joint Canadian-United States Basic Defence Plan No. 2 (Short Title ABC-22), 28 July 1941, DHH 355.009 (D20).
- 30 ABC-22, 28 July 1941, DHH 355.009 (D20).
- 31 ABC-22, 28 July 1941, DHH 355.009 (D20).
- 32 The modern definition of "operational command" is:
 The authority granted to a commander to assign missions or tasks to subordinate commanders, to deploy units, to reassign forces and to retain or delegate OPCON [operational control] and/or tactical control (TACON) as may be deemed necessary. It does not of itself include responsibility for administration or logistics.
 Source: *Canadian Forces Operations*, B-GJ-005-300/FP-000, 15 August 2005, Chapter 2, Section I, Subsection 202.2b.
- 33 Brigadier-General L.T. Gerow, Acting Assistant Chief of Staff, War Plans Division, to Senior Army Member, Permanent Joint Board on Defense, Canada-United States, 17 June 1941, NARA, RG 165, WPD 4330-21.
- 34 Embick Memorandum to Acting Chief of Staff, War Plans Division, "Joint Canadian-United States Plan No. 2 (ABC-22)," 7 June 1941, NARA, RG 165, WPD 4330-21.
- 35 Dziuban, *Military Relations*, 105; Bissel to Cuffe, 2 September 1941, LAC, RG 24, Vol. 2725, File HQS 5199-W-1-B Part 2.
- 36 Bissel to Pope, 18 September 1941, LAC, RG 24, Vol. 2725, HQC 5199-W-1-B Part 2; Pope to Crerar, 29 September 1941, DHH 112.11 (D1A) Volume 3; Chiefs of Staff Committee to the Ministers of National Defence, 30 September 1941, LAC, RG 24, Vol. 2725, HQC 5199-W-1-B Part 2; Embick to Pope, 10 October 1941, NARA, RG 59, State Department Files, PJBD, Box # 8, File Correspondence of PJBD, July to October 1941; 112th Meeting of the Cabinet War Committee, 15 October 1941, Minutes of the Cabinet War Committee, Volume VI, LAC, RG 2, 7C, Volume 5, Microfilm # C-4654, copy at CFC IRC; Pope to Embick, 16 October 1941, NARA, RG 165, WPD 4330-22.
- 37 Dziuban, *Military Relations*, 106; Memorandum of the Joint Planning Sub-Committee, 25 September 1941, Joint Planning Committee, Minutes to Meetings and Correspondence, Volume 1, September 1941 to September 1944, DHH 2002/17, Box 53, File 8; Wing Commander J.G. Bryans, Assistant Air Attaché, Canadian Legation, Washington, to Chief of the Air Staff, RCAF Headquarters, Ottawa, 25 September 1941, DHH 314.009 (D116); DMO&I to GOC-in-C, Atlantic Command, 24 October 1941, LAC, RG 24, Vol. 2725, HQC 5199-W-1-B Part 2; Biggar to Ralston, 8 October 1941, LAC, MG 27 III B11, J.L. Ralston Fonds, File "Joint Defence board - Gen. (Secret)."
- 38 For the Canadian perspective of Newfoundland being an integral part of the overall defence of eastern Canada, see: Elkins to Pope, 30 and 31 December 1941, Massey Library (ML), Royal Military College of Canada (RMC), Kingston, Major-General W.H.P. Elkins Papers, File 19 "Semi-Official Correspondence Vol. # 3 - November 1941 to May 1942"; Air Vice-Marshal N.R. Anderson, Air Member for Air Staff (AMAS) to Chief of the Air Staff (CAS), 5 March 1942, Library and Archives Canada (hereafter LAC), Record Group (hereafter RG) 24, Volume 5290, File HQS 15-73-4 Part 1; Memorandum from Joint Planning Sub-Committee to Chiefs of Staff Committee, 8 August 1942, LAC, RG 24, Volume 5209, File HQS 15-73-4, Part 2.
- 39 Stacey, *Arms, Men and Governments*, 363; DHH 73/770, "U.S. Air Defense in the Northeast 1940-1957;" Continental Air Defense Command Historical Reference Paper Number One, Colorado

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- Springs, Headquarters Continental Air Defense Command, Ent Air Force Base, 1 April 1957, 31.
- 40 W.A.B. Douglas, "Democratic Spirit and Purpose: Problems in Canadian-American Relations, 1934-1945," in Joel Sokolsky and Joseph T. Jockel, eds., *Fifty Years of Canada-United States Defense Cooperation: The Road From Ogdensburg* (Lewiston: The Edwin Mellen Press, 1992), 43. Newfoundland Governor Vice-Admiral (retired) Sir Humphrey Walwyn once described Brant as an "impossible character... a better sportsman than a soldier." Quoted in Peter Neary, *Newfoundland and the North Atlantic World, 1929-1949* (Kingston and Montreal: McGill-Queen's University Press, 1988), 205.
- 41 Brant in fact lamented the lack of unity of command in joint U.S. Army-U.S. Navy exercises of April 1924 when testifying at the court-martial of American air power advocate Brigadier-General William "Billy" Mitchell in 1925. "Major General Gerald Clark Brant," Biography, United States Air Force, <http://www.af.mil/information/bios/bio.asp?bioID=9825>, accessed 28 August 2009; Douglas C. Waller, *A Question of Loyalty: Gen. Billy Mitchell and the Court-Martial that Gripped the Nation* (New York: Harper Collins Publishers, 2004), 187-190.
- 42 Pope Memo to Crerar, "Permanent Joint Board on Defence Montreal, 10-11 November, 1941," 12 November 1941, DHH 112.11 (D1A) Volume 3.
- 43 John F. Shiner, "The Air Corps, the Navy, and Coast Defense, 1919-1941," *Military Affairs*, Volume 45, Number 3 (October 1981), 119; Perras, *Necessary, but Not Necessary Enough*, 83-84.
- 44 "Memorandum of conversation with Admiral Nelles, Chief of the Naval Staff," from the American Minister, Ottawa to the Secretary of State, Washington, 11 December 1941, United States National Archives and Records Administration, College Park, Maryland (NARA), RG 337, Headquarters, Army Field Forces, General Correspondence, 1940-42, Entry 57, File 334.8 "Joint Boards Canada-United States"; Assistant Chief of the General Staff (ACGS) Memorandum, "Joint Canadian-United States Basic Defence Plan No. 2," 8 December 1941, LAC, RG 24, Volume 2725, File HQC 5199-W-1-B Part 2; "Unity of Joint Defence Command Not Essential, Ottawa Declares," *Montreal Gazette*, 11 December 1941, clipping in NARA, RG 59, PJB, Entry E1177, Box 6, File "Public Statements"; Pope Memorandum, "Note on Question of United States-Canada Unity of Command," 18 December 1941, DHH 112.3M2 (D495); Major-General Maurice Pope, Commodore H.E. Reid and Group Captain F.V. Heakes memorandum "Command Relations - Newfoundland" to Chiefs of Staff Committee, 31 December 1941, DHH 72/145.
- 45 LaGuardia to Biggar, 2 January 1942, NARA, RG 59, State Department Files, PJB, Box # 9, File Correspondence of PJB, January to March 1942. See also Perras, *Necessary, but Not Necessary Enough*, 84-85.
- 46 Ibid.
- 47 Perras, *Necessary, But Not Necessary Enough*, 84.
- 48 Pope to Stuart, 3 January 1942, DHH 112.11 (D1A) Volume 3; "Notes for Meeting Canadian Section, Permanent Joint Board on Defence," 3 January 1941, LAC, RG 24, Volume 5209, File HQS 15-73-4 Part 1. Quote from former.
- 49 Pope to Stuart, 3 January 1942, DHH 112.11 (D1A) Volume 3. Large-scale Japanese operations against the Aleutians "as a Japanese defensive measure against future bombing of Japan" from the Alaskan islands, however, was "in a different category," as they were treated as expeditionary operations. For Canadian-American operations in the Aleutians during the war, see Galen Roger Perras, *Stepping Stones to Nowhere: The Aleutian Islands, Alaska, and American Military Strategy, 1867-*

- 1945 (Annapolis: Naval Institute Press, 2003).
- 50 Perras has described Canada's efforts to resist American unity of command on the west coast as "fundamentally dishonest at its core" because the Canadian planners knew that whatever the threat to the Pacific coast they would be safe under "an American military shield." Galen Roger Perras, "Who Will Defend British Columbia? Unity of Command on the West Coast, 1934-1942," *Pacific Northwest Quarterly*, Volume 88, Number 2 (Spring 1997), 67.
- 51 Minutes of the 135th Meeting of the Chiefs of Staff Committee, 7 January 1942, Joint Staff Fonds, DHH 2002/17, Box 69, File 14.
- 52 Chief of Naval Operations memorandum "Unity of command over joint operations" to Chief of Staff, U.S. Army, n.d. [2 December 1941], NARA, RG 165, Files of the War Department, File WPD 2917-35; Perras, *Necessity, But Not Necessary Enough*, 84.
- 53 Minutes of the 135th Meeting of the Chiefs of Staff Committee, 7 January 1942, Joint Staff Fonds, DHH 2002/17, Box 69, File 14.
- 54 Minutes of the 135th Meeting of the Chiefs of Staff Committee, 7 January 1942, Joint Staff Fonds, DHH 2002/17, Box 69, File 14.
- 55 Pope Memorandum to Mackenzie King, 13 January 1942 and Biggar to Mackenzie King, 13 January 1942, reproduced in Hilliker, ed., *DCER*, 9, 1942-1943, 1151-1153; Embick to Biggar, 14 January 1942, NARA, RG 59, State Department Files, PJBD, Box # 9, File Correspondence of PJBD, January to March 1942; Pope Memorandum "Southern British Columbia-Puget Sound U.S. Request for Institution of Unity of Command" to Stuart, 16 January 1942, DHH 112.11 (D1A) Volume 3; Pope to Embick, 19 January 1942, DHH 112.11 (D1A) Volume 3; Minutes of the 138th Meeting of the Chiefs of Staff Committee, 17 January 1942, Joint Staff Fonds, DHH 2002/17, Box 17, File 14; Minutes of the 25th Meeting of the Permanent Joint Board on Defence, Montreal, 20 January 1942, DHH 82/196, File 2, PJBD Journals Volume 2.
- 56 Waller, *A Question of Loyalty*, 187-190.
- 57 Douglas, *Creation of a National Air Force*, 496; "Major General Gerald Clark Brant," Biography, United States Air Force, <http://www.af.mi/information/bios/bio.asp?bioID=9825>, accessed 28 August 2009. For Billy Mitchell's court-martial, see Douglas C. Waller, *A Question of Loyalty: Gen. Billy Mitchell and the Court-Martial that Gripped the Nation* (New York: Harper Collins Publishers, 2004).
- 58 DRAFT Memorandum by Page to Murray and McEwen, n.d. [25 June 1942], LAC, RG 24, Volume 11,927, File 1550-146/36-2.
- 59 Murray to Page, 25 June 1942, LAC, RG 24, Volume 11,927, File 1550-146/36-2.
- 60 Drum to Elkins, 21 August 1942, Chiefs of Staff Committee Memoranda, Joint Staff Fonds, DHH 2002/17, Box 65, File 11; Extract from General Page's Diary, 18 June 1942, DHH 321.009 (D201); Elkins to Secretary of the Chiefs of Staff Committee, 24 August 1942, LAC, RG 24, Volume 5209, File HQS 15-73-4 Part 2; Minutes of the 177th and 178th Meetings of the Chiefs of Staff Committee, 25 August and 1 September 1942, respectively, Joint Staff Fonds, DHH 2002/17, Box 70, File 1; Secretary, Chiefs of Staff Committee, to GOCinC Atlantic Command, 3 September 1942, LAC, RG 25, Volume 1991, File 1556-C; Minutes of the 189th Meeting of the Cabinet War Committee, 9 September 1942, LAC, RG 2, 7C, Volume 9, microfilm reel # C-4874, copy at CFC IRC.
- 61 Brant to Drum, n.d., quoted in Drum to Marshall, 13 May 1942, G.C. Marshall Papers, Reel 5, Subject: 1942 Unity of Command in Newfoundland, copy at ML, RMC; LaGuardia to Drum, 1 October 1942, copy in DHH 99/36, W.A.B. Douglas Fonds, Box 14, File 1.

North American Exceptionalism in Wartime: Media Representation of the First Special Service Force

James Wood

From the Ogdensburg Agreement of 1940 to the present day, Canadian military forces have often acted in direct concert with their American allies. The First Special Service Force was a unique development in the history of this US-Canadian partnership. Composed of soldiers drawn from the armies of both Canada and the United States, the Force was the first and only example of a completely integrated North American military formation. While originally conceived as a long-range sabotage outfit, in the autumn of 1942 the First Special Service Force (FSSF) was reorganized as an élite light infantry brigade for employment in the Mediterranean Theatre. In 1943-1944, it fought a series of difficult campaigns in Italy and Southern France, where it came to be distinguished by its outstanding combat record and its unique, bi-national composition. To this day, the First Special Service Force represents the closest that Canadian soldiers have come to a complete, working integration with the armed forces of the United States. This paper will discuss media representation of the First Special Service Force (FSSF) at war, addressing US and Canadian coverage of its activation, employment and ultimate disbandment.

Throughout its brief existence from 1942 to 1944, the unit was characterized by effectiveness at the front, based on exceptional training and good relations between Canadian and American officers and their men. In the process, it became a symbol of Allied unity and the commitment of the two nations to winning the war. Once the veil of secrecy that initially cloaked the FSSF was lifted, media coverage of the Force by both Canadian and American war correspondents portrayed the unit as a quintessentially “North American” military formation, a symbol of the common values of its citizen soldiers and the nations they represented. Of course, the very fact that what had begun as a “top secret” unit received this kind of media attention is itself significant. The bi-national composition of the FSSF became a source of pride for the peoples of Canada and the United States and this became the focus of media coverage of the unit. At the same time, however, the hidden administrative

liabilities of an international formation were beginning to wear down the Force's effectiveness, leading to its disbandment at the end of 1944.

Activation and Training at Helena

Following the attack on Pearl Harbor on 7 December 1941, the United States joined the Allies in the war against the Axis powers. In the spring of 1942, despite the dismal situation of occupied Europe, there was nevertheless a certain degree of euphoria in Ottawa owing to the American entry into the war. On July 12th 1942, Canadian Prime Minister William Lyon Mackenzie King – a prime minister whose concern with fostering better relations with the Americans is almost legendary – authorized the movement of nearly 700 Canadian officers and men to the United States for training as part of a joint US-Canadian military formation. Training began at a newly expanded US National Guard camp at Fort William Henry Harrison in Helena, Montana.

Originally created by British and American planners for the purpose of sabotaging industrial targets in German-occupied Europe, the Force represented a tenuous, experimental attempt by Canada and the United States to ignore national distinctions and create a truly international North American military formation. Within the Force, Canadian and American soldiers wore the same uniforms, carried the same weapons, and answered to the same superiors, regardless of nationality. As was later pointed out by *Montreal Star* correspondent Sholto Watt, within the Force an American private could answer to a Canadian sergeant, who in turn reported to an American lieutenant, and so on.¹ All the way up the chain of command, Canadians and Americans were completely integrated, and this was later seen as something remarkable by media correspondents from both countries who never failed to comment on this unique characteristic of the Force. All told, this combined North American formation was founded upon an ongoing effort to ignore national distinctions in the interests of a common cause.

Given the secretive nature of the Force's initial tasking, the first "media" coverage of the unit was a product of the unit's own press arm. On 20 July 1942, the First Special Service Force Photo Unit was created, composed of photographers from the US Signal Corps who were attached to the FSSF Service Battalion. Their comprehensive 16 mm Force training films were shown to groups of up to 500 at a time in a theatre specially constructed at Fort William Henry Harrison for training purposes. The filming of jump landings, use of explosives, scaling mountains, snowshoe and ski training, and hand-to-hand combat all served to increase the instructional efficiency of the unit, particularly for parachute landings. Injuries, including broken legs, knees,

and sprains, were reduced from a weekly high of 25 percent to 1 percent after slow-motion analysis of the film images and intensive classroom instruction. Training the FSSF was a high priority in 1942: film, cameras and projectors, the photo building and theatre, darkroom equipment, and trips to a Chicago lab for special processing -- all were considered to be of absolute necessity for the Force, and in general no expense was spared for this purpose. Although utmost secrecy was maintained throughout this early period, the result was an extensive record of the unit's activation in photographs and in film that still exists to this day.²

Diplomatic Cracks

Maintaining secrecy was strategically necessary given the unit's intended purpose as a long-range sabotage outfit. When it came to the release of information through the media, however, the Canadian government had a more pressing concern: presenting the Force as a *combined* effort by Canada and the United States, rather than an American unit that happened to have a few Canadian soldiers serving in its ranks. The first of these two images was the precise sort that PM Mackenzie King wanted to foster in 1942, as it would serve to highlight Canada's new partnership with the United States. The latter image of Canadian soldiers being turned over to the US Army, however, would quite obviously present a political liability for King if it were to become widely publicized. While the US Personnel Branch of General Staff supported a proposal of the new Force commander, Colonel Robert T. Frederick, that administration of pay, records, and discipline would be simplified if Canadian FSSF personnel were to take the oath of service and obedience to the US Army, Canadian officials quickly responded by noting the political difficulties such a move would entail.³ Instead, the Canadians kept their men on Canadian pay-books and continued to protect the top secret status of the FSSF. For security, Canadian military command decided in July 1942 to disguise any discussions regarding the Force by describing the unit as a new parachute battalion.⁴

With such an emphasis on secrecy, one can only imagine the shock experienced by Canadian government and military officials when they read a US War Department press release announcing the creation of the First Special Service Force as a new formation of the US Army. Announced on 6 August 1942 – the very same day that Canadian troops were arriving at Fort William Henry Harrison for training – the War Department's press release was initially viewed in Ottawa as a breach of operational security. Upon recovering from this surprise, Ottawa issued a statement of its own that closely matched the recent press release by the US War Department:

The Minister of National Defence announced today the formation of joint Canadian-United States Force to undergo special training for offensive warfare including parachute training, Marine landings, mountain fighting and desert warfare.... The new unit to be known as the 1st Special Service Force will be under command of Colonel Robert T. Frederick, U.S. Army, with Lt.-Col. J.G. McQueen of the Calgary Highlanders as second in command.⁵

The Canadian press release made a point of countering the American announcement in which the Canadian soldiers were said to be arriving for training in a new formation of the US Army. It also emphasized that a Canadian would be second in command. An encrypted message from the Canadian Government then instructed Lester B. Pearson, the *Chargé d’Affaires* in Washington, to inform US authorities that the Canadian government had been “very seriously embarrassed by this announcement of establishment of [a] Joint Force, particulars of which have been kept as closest military secret.”⁶ Following Pearson’s formal protest, the US Director of Public Relations expressed “the great regret of his department for the premature announcement,” explaining that there had been a mix-up between two administrative divisions of the War Department, each thinking that the other had cleared the matter with the Canadian authorities. Future announcements would be taken up through the Military Attaché to the Press Attaché of War Department to allow simultaneous publication.⁷

The Force by this time was receiving some very specialized and expensive training for an exceedingly dangerous mission – Operation PLOUGH – the intent of which was designed to parachute the Force into occupied Norway for the purpose of destroying hydroelectric dams. Unfortunately, when the Royal Air Force proved unwilling to divert British Lancasters from the bombing of Germany in order to drop the force on Norway and the Norwegian government-in-exile in London objected to the proposed destruction of an important element of their country’s national infrastructure, the scramble was on to find something to do with this highly specialized and extremely expensive special operations unit.

Even though the FSSF was brigade-size formation, decisions regarding its employment were in the hands of the combined chiefs of staff, which included Prime Minister Churchill, President Roosevelt, and their military chiefs of staff. The United States, for its part, had originally undertaken the Norway mission at the suggestion of the British, and since the spring of 1942 had devoted considerable resources to its development. The Canadian

government, meanwhile, had always taken a hands-off approach to strategic decisions and actually went so far at this point as to relinquish its right to withdraw the Canadians from the FSSF once approval for a general assignment had been given. Once a proposed mission had been approved in Ottawa, the Canadian Chief of General Staff believed: "We can safely leave the operational planning to the United States authorities. They are not given to rash military undertakings."⁸ With the cancellation of a landing in Norway, however, it would be another eight months before a new mission could be found for the FSSF.

Meanwhile, although the identity and purpose of the new troops stationed at Fort William Henry Harrison remained secret, the people of Helena soon came to know the men from their visits to town. They were often seen drinking at establishments such as the Gold Bar, a favourite local "watering hole." Forcemen dated young women of the town and, given the nature of parachute training in 1942, they were also frequent patients at the Helena hospital. The townspeople often came out to watch parachute jumping practice and were generally happy for the money that American and Canadian servicemen brought to the local economy, not to mention the substantial Federal spending on supplies and requirements of the post.⁹ But the mission itself remained secret to outsiders and unknown to Force insiders -- which in a military context is an ideal environment for the cultivation of rumours. At the Fort there was a constantly-evolving series of tall tales among the men regarding the unit's objectives, with imagined missions ranging from a commando raid in Norway to the assassination (or rescue) of Mussolini, an airborne campaign in Burma, or a suicide mission to the destroy the oilfields of Rumania.

What the soldiers of the FSSF did not know was that even the Allied high command remained unsure of what to do with them. Frederick later recalled that "in one day in Washington within fourteen hours the Force had been assigned to 6 different missions."¹⁰ Constant speculation, both at Fort William Henry Harrison and in the town of Helena, was matched by the Force's concern to maintain secrecy, as reflected in a post-war interview with Captain Finn Roll, one of the original four headquarters staff in Helena:

Rumors were constantly flying around... One good-looking doll took me out for a drive in a new Buick. She asked me when we were leaving. I said I did not know. I reported this to Col. Wickham and suggested the FBI look into her. They did. Reported back she was harmless, only wanted to get me in bed. Col. Adams

blew his top. As a matter of fact, to my knowledge, no one found out our original mission.¹¹

In a separate interview, Lieutenant-Colonel Kenneth G. Wickham also referred to the incident, explaining that the FBI had found the woman not only harmless but to have come from a good family. Shortly afterwards, she berated Wickham at the exclusive Montana Club regarding the questioning. In his recollections Wickham added that the woman later took another Canadian officer to her ranch for Christmas.¹² Well known as these soldiers were to the people of the town, their precise mission remained secret when on 6 April 1943 the 2300 men of the First Special Service Force marched in a farewell parade through downtown Helena. They had been posted to camp Bradford in Norfolk, Virginia for amphibious training while still awaiting their first combat mission.

Anonymous at Kiska

When the First Special Service Force was ultimately sent into combat, it was not for a reckless air-drop into enemy territory as originally planned, but rather as the spearhead of a combined US-Canadian amphibious landing. In August of 1943, US and Canadian forces were chosen by the US Joint Chiefs of Staff for the American invasion of Kiska, one of the Aleutian Islands occupied by Japan earlier in the war. Although the 13th Canadian Infantry Brigade, composed of NRMA conscripts, was the first Canadian unit selected to join an American task force, by 12 June the US War Department decided to include the FSSF as well.¹³ The Force was to be incorporated into an amphibious invasion that seemed an odd choice for a parachute unit's first assignment. Fortunately or not, however, when the FSSF landed on Kiska on 15 August 1943, it was found that the Japanese garrison -- once estimated to be 10,000 strong -- had already abandoned the island.¹⁴ Fog in the Alaska region had been so intense that month that the Japanese were able to evacuate their garrison by sea without being observed. The landings were covered in detail by both the Canadian and American press, with the forces of each nation being mentioned individually as separate units. No mention was made, however, of the FSSF; the presence of a combined bi-national force was not even hinted at in the US or Canadian press.¹⁵

On 22 August 1943, the front page of the *New York Times* carried Sidney Shalett's just-released article, "U.S. - Canadian Forces Take Kiska," followed by another on the next page: "Joint Statement on Kiska is Issued - Roosevelt and Mackenzie King Announce Recapture of Island from Enemy." The

Toronto *Globe & Mail* of the same day featured the article "Canucks Help Retake Kiska," followed the next day by John Dauphinée's "Canada, U.S. Take Kiska." Like the American press, the Toronto *Globe & Mail* covered the action as that of two separate national units in a combined assault in which Canadians comprised about one-sixth of the invasion force. Press coverage focused on a great spirit of cooperation in a joint assault under the leadership of US Vice-Admiral Thomas C. Kinkaid. Foreshadowing what would later become known about the FSSF, Kiska media coverage explained that all equipment carried by Canadian troops during the landings was US Army regulation issue.¹⁶ With its involvement in the landings unacknowledged in the press, the Force prepared to begin its transfer from the fog-shrouded Aleutians to cold and muddy Italian front of winter 1943-44.

Monte La Difensa: Secret Victory

In the fall of 1943, the US Joint Chiefs of Staff decided to send the First Special Service Force to Italy to join the US Fifth Army, whose advance was running parallel to the British Eighth Army moving up the Italian peninsula. The Allies were now approaching the main line of the German defences barring the approaches to Rome. On the American side of the Apennines, the advance had stalled before a belt of German fortifications known as the Winter Line. The Force arrived here on 17 November 1943, during a stalemate in the US Fifth Army's drive towards Rome. Having despaired of finding a parachute mission for the Force, this highly-trained and very expensive force was about to be thrown into the Italian meat-grinder, tasked with overcoming entrenched German positions in the mountainous Camino-la Difensa-Mignano range.

On 24 November, the Force received orders to capture the summit of Monte la Difensa, a mountain stronghold that had been frustrating the American advance for almost a month. On the night of 2-3 December, the Second Regiment of the Force conducted a very risky assault up the cliffs on the north face of the mountain, which the enemy had left unguarded as they believed them to be impassable. This was the highly-specialized type of work the Force had been designed to do; the ascent was conducted at night while an artillery barrage hammered away at the top of the mountain, not with the usual purpose of providing fire support to an assault but rather to cover the noise of the Force's ascent.

As the attack began, *New York Times* correspondent Herbert L. Matthews reported the artillery barrage and flights of B-25s and A-36s pounding the summit of la Difensa, noting that "We all knew that the Germans had dug

themselves into rock masses and were hardly likely to be killed by shells."¹⁷ Matthews was right. As the shells and bombs crashed into the Camino-Difensa hill mass, the reinforced 3rd Battalion of the 104th *Panzer Grenadier* Regiment on la Difensa withdrew to their pillboxes and caves to wait out the attack.

Unlike the earlier failed attempts to take Monte la Difensa by its more gradual south face, the FSSF made its way up 300-foot cliffs using ropes and climbing gear, which allowed them to reach the summit and then attack downhill, knocking out German bunkers that were facing in the wrong direction. Success was achieved this time: in the first two hours of fighting on 3 December 1943, the Force mounted a successful surprise attack and captured a height of land that had been holding out against the British and Americans since the first week of November. In addition to 75 enemy dead, 43 Germans were taken off the peak as prisoners of war. The next day, Herbert Matthews reported for the *New York Times*: "In one of the most important battles of the Italian campaign, Allied troops drove their way up and over the highest peaks of the Mount Camino mass... Monastery Hill, La Maggiore, and La Difensa are in our hands."¹⁸ Optimistic as it was, the report missed the mark on a number of details, including its assertion that the supporting artillery barrage the night before had left the Germans "too stunned to offer opposition." The steady line of FSSF and German casualties making their way down the mountain served as evidence that the Difensa summit had not been taken without a fight. Matthews was also unaware that the British 56th Division had been able to hold Monte Camino (Monastery Hill) for only a brief period before heavy fire from a nearby slope forced them to withdraw from the summit. The news reached the FSSF atop Monte la Difensa later the same day when a supply train of Third Regiment and Service Battalion men arrived, having ascended the cliffs carrying ammunition, water, rations, and blankets – supplies essential to holding their position and surviving the cold rain, wet snow, and falling temperatures that were already producing hypothermia and exhaustion casualties.

In what was in reality a terribly violent and confused firefight over the next six days, the Force was all but isolated as it held against repeated German counterattacks. Monte la Difensa was a key point in the German defences – from its summit German artillery observers had been able to direct fire down onto Allied armour should it try to push its way up the valley below. Supplies were limited, as every meal and every bullet had to be carried to the summit on someone's back – not even mules could make it up la Difensa. It was an 8-hour climb to the summit, but the way down could be *much* longer:

many of the wounded, for example, had to be lowered down the cliffs by stretcher. Despite all this, the Force held its ground against repeated German counterattacks and artillery bombardment while it waited to be relieved by conventional infantry units.

Throughout the first week of December, American and Canadian newspapers reported daily on the progress of troops fighting on the slopes of Monte la Difensa and Camino. Nevertheless, while the attack itself received a great deal of enthusiastic media attention, the role -- or even the existence -- of the FSSF was not yet reported by the press of either nation. Thus, at la Difensa, the identity of this élite American-Canadian unit was shrouded in secrecy. It would remain so throughout the winter, with the papers back home reporting the actions, but not the identity, of these soldiers who fought as part of the first integrated North American fighting unit.

By the end of the week, reports of American war correspondents took on a more reserved tone. In the *New York Times*, Milton Bracker reported that the fight for the Camino-Difensa hill complex had become a "slow, tortuous envelopment of numberless ridges and peaks; ...the entire tone of the struggle is one of fierce will to resist. Despite severe losses, the German Tenth Army is setting a standard of savage defensive fighting that its opponents will never forget."¹⁹ The *Toronto Globe & Mail*, meanwhile, reported the fighting in the American Fifth Army sector to be a "savage new offensive for control of the Mignano Pass," with Fifth Army's mud-splattered Anglo-American infantrymen opposed by stubborn German defenders.²⁰ Press coverage continued to refer only to the US Fifth Army, with presence of Canadian soldiers going unmentioned, nor was the FSSF given credit for their spectacular victory on Monte la Difensa.²¹ In later interviews, Warrant Officer Angus Bush recalled visits from war correspondents such as Ernie Pyle, Robert Capa, Sholto Watt and Don Whitehead, all of whom wanted to talk about the Force and their victory but who had to await clearance from the military censors to do so.²²

Overall, the battle for la Difensa was a six-day effort that cost the force some 511 casualties, or roughly a quarter of its total combat strength. The unit's performance in the capture of a formerly impregnable stronghold brought it to the notice of Lieutenant-General Mark Clark, Commanding General of US Fifth Army. In his commendation to the unit, Clark congratulated the Force for capturing la Difensa, the possession of which was vital to further advance in that sector. He noted that in spite of adverse weather conditions and heavy enemy rifle, machine-gun, mortar, and artillery fire on the precipitous slopes, the Force's position had been maintained in the face of bitter counterattacks and difficulties with communication and supply. Clark

saw the Force's hard-won victory both as a tribute to fine leadership and a splendid reward for time spent in arduous training.²³

Although the identity of the First Special Service Force remained anonymous, the result of their first battle did not. On 9 December, the front page of the *New York Times* announced, "By grim process of gouging out its way from height to height ... Lt. Gen. Mark Clark's Fifth Army has won control of the major dominating heights over twenty-five square miles of the Camino-Difensa-Maggiore mountain masses."²⁴ From this point forward, the Force found itself thrown head-long into the sort of infantry engagements where a conventional unit would have served just as well. Following its success at Monte la Difensa, the FSSF was assigned the right flank of the American advance as it rolled up the German defences to the north. In the meantime, on Christmas Day, elements of the Force conducted a downhill frontal assault against German strongholds on the western spur of Monte Sammucro. Though the attack was successful, the subsequent shelling and losses to trench foot and exposure reduced several companies who took part in this fighting to between 20 and 30 percent strength. From New Year's Day until January 17th, the Third Regiment of the Force fought a bitter campaign to overcome entrenched German positions on Monte Majo. The extreme cold, difficult terrain and stubborn German resistance exacted a heavy toll. By the time the Force was withdrawn from the front for rest and reorganization, the casualties suffered to date had reduced its combat element to approximately 50% strength.²⁵

The Black Devils of Anzio

In spite of its heavy casualties, the First Special Service Force was ordered on 31 January 1944 to board a small fleet of landing craft bound for the port of Anzio, where it was to take up defensive positions on the right flank of the newly-established Allied beachhead. At Anzio, the existence of the FSSF was finally released by military censors. Although he had followed the Force through its campaign at la Difensa, Sholto Watt of the *Montreal Star* had always been required to keep these reports secret. That changed in April 1944, and Watt now made up for lost time in news reports that waxed poetic on the international significance of the FSSF. In his article, "Crack Mixed Force Is Gradually Becoming American," released for publication on 9 April 1944, Watt reported, "No parallel can be found for the U.S.-Canadian mixed force which has opened its fighting career in Italy with a series of brilliant victories. Canadians remain in their own army for pay and administration, Americans in theirs. The force has two armies behind it, two governments,

two peoples.”²⁶ After speaking with Forcemen and following them in combat, Watt had come to admire them. He explained that they were justifiably proud of their achievements, yet, “They do not brag. They are not ‘tough’; they are soft-spoken, with gentle manners – and sometimes the mildest and meekest are fiercest in action. They are buoyant after a harsh and costly baptism in fire.”²⁷ Robert Burhans, S-2 Intelligence Officer for the FSSF and later the author of its highly regarded operational history, acknowledged that Watt “knew the Force best of any man outside it.”²⁸ Much as Watt publicized the strengths and camaraderie of the FSSF, he also issued realistic reports of its weaknesses:

These losses [at Difensa] were particularly devastating to the Canadian element, as it had been decided in April 1943 that the Canadian army would provide the unit with no reinforcements upon departure for overseas. The Force had been designed for a single use against the point where it could do the most damage to the German war effort – [thus] the Canadian army had not undertaken a commitment to maintaining the force on a long-term basis.²⁹

With increased media representation of the Force at Anzio, the “Black Devils” legend was born. War correspondents such as Robert Vermillion, Ernie Pyle, and Eric Sevareid popularized the exploits of the FSSF. Clinton Conger wrote of the Devil’s Brigade as recorded in the diary of a captured German prisoner: “The black devils are all around us. [They are on us] every time we come into the line, and we never hear them come.”³⁰ With six weekly columns reaching 13 million readers in the USA, Ernie Pyle portrayed the horrors of constant shelling and explosions along the Anzio front: “On this beachhead every inch of our territory is under German artillery fire. There is no rear area that is immune, as in most battle zones. They can reach us with their 88s, and they use everything from that on up.”³¹

Military newspapers, including Canada’s *The Maple Leaf* and the American *Stars and Stripes*, now carried regular features on the Black Devils. Out of the Italian village of Borgo Sabotino, renamed “Gusville,” First Regiment, under Captain Gus Heilman, published their own *Gusville Herald Tribune*. The fame of the Black Devils was not all military – their reputation as “scavengers” of food also travelled far and wide. Robert Vermillion of the United Press, for example, accompanied the Black Devils as they returned from a patrol in no-man’s land with a wounded German soldier, a wheel-

barrow full of sweet potatoes, bushels of peanuts, two dozen eggs and one rabbit. Vermillion further reported that the livestock holdings of Gusville included eight cows, fourteen chickens, six pigs, and three horses³² -- all stolen from the German occupiers who, presumably, had stolen them from the Italians. Some of these agricultural and culinary exploits even became the raw material for Bill Mauldin's "Willie and Joe," a cartoon series portraying the life of two fictional American soldiers in the Anzio beachhead.

From Anzio, the American and Canadian reading public came to know of the exploits -- military and otherwise -- of the First Special Service Force. The ban on publicity had been lifted and the Force became legendary as a consequence of this continuing media coverage. Sholto Watt took advantage of the relaxed censorship to stress the international significance of the unit: "The world has certainly been informed enough of the unguarded frontier, the long peace between our two nations. This is another step from the static to the active; from 'We will not interfere with each other' to 'We will do big things together'."³³ Always realistic, however, Watt envisioned an uncertain future for the Force owing to its extremely high casualty rates. In a section entitled "No Canadian Replacements," Watt observed that:

If it continues in the same brilliant way, [the FSSF] may become a legend of this war that will exert its influence in peace to no small advantage. But -- there is a big but -- the force at present receives little or no Canadian replacements for the Canadian casualties. U.S. replacements come in and Canadians are already outnumbered in a proportion of seven to three.³⁴

The Race for Rome

As Watt hoped, American and Canadian soldiers of the FSSF continued to "do big things together" in the spring of 1944. On the morning of 23 May 1944, the Force began its breakout from the Anzio beachhead. During the opening phases of the attack, the Force made a rapid advance to cut Highway 7 and the rail line beyond, but was soon forced into a temporary withdrawal when a counterattack by German Tigers knocked out much of the unit's supporting armour and shattered two of First Regiment's forward companies. Reorganizing for the next phase of the attack on 25 May, Third Regiment advanced to secure the heights of Monte Arrestino, occupying it that afternoon in support of US 3rd Division's push toward Cori. As he accompanied them, Sholto Watt could see their renewed energy and sensed that they were indeed "special":

“The men of the [Force] take a tremendous pride in their international composition... You couldn’t tell whether you were talking to Americans or Canadians in the Force, and indeed the Force gives the impression of having formed something new, a synthesis of North America, but of North America at its best.”³⁵

All across the Allied front, the Germans were withdrawing their forces toward Rome. Determined to be the liberator of the Eternal City, General Mark Clark directed the main body of his forces to advance northward, leaving the monumental task of blocking the German Tenth Army’s withdrawal up Highway 6 to what remained of the FSSF, along with elements of the US 3rd Division and the 1st Armored Division. Determined to take Rome before the British Eighth Army -- and before the impending landings at Normandy diverted attention from the Italian theatre -- Clark ignored General Alexander’s orders to create a roadblock on Highway 6 that would check the retreat by the German Tenth Army by blocking the only available route for its withdrawal.³⁶ Instead, Clark shifted the axis of the VI Corps advance toward Rome, allowing the Germans an opportunity to prevent the encirclement and destruction of their forces moving along Highway 6. Consequently, a gap was created through which retreating Germans were allowed to escape and later rebuild their badly shaken divisions. War correspondent Eric Sevareid submitted a script for broadcast questioning the impossible role faced by the troops sent to hold back the tide of this German retreat. Military censors blocked these reports, however, and Clark was visibly angry with Sevareid for criticizing his decision to “rush straight for Rome.”³⁷

On 28 May, the Force set out from the high ground overlooking the town of Artena, advancing into a storm of concentrated artillery, tank, and small arms fire in a five-hour effort to sever the enemy’s line of communications along Highway 6. Pushing the advance in the direction of Valmontone and Colleferro, it was not until 2 June that the latter town was captured in an attack led by Second Regiment. Effective the next day, Task Force Howze – comprised of the 81st Reconnaissance Battalion and the 13th Armored Infantry – was attached to the First Special Service Force to provide armoured support for II Corps’ final advance on Rome. General Clark was nearby and given his concern for publicity-hunting there was to be heightened media attention on the FSSF. Captain Mark T. Radcliffe of Third Regiment, winner of both Silver and Bronze Stars for earlier actions, now received a special assignment from Brigadier-General Frederick. Although Burhans later described it as a “reconnaissance patrol” in the unit’s operational history,³⁸ publicity was undoubt-

edly its main purpose, as evidenced by the after-action report submitted by Radcliffe to Frederick upon its completion.³⁹ Radcliffe was assigned to lead a patrol of 60 men in 18 jeeps, accompanied by one movie cameraman, two still cameramen, and a news reporter. Their task was to be the first Allied soldiers to enter Rome -- marking their route with signposts reading "Follow the Blue to Speedy II." Radcliffe noted their time of entry into the outskirts of Rome as 6 am on 4 June. Photographers documented the entire mission, confirming the time and position of patrols as they entered the city, including a well-known shot of Radcliffe's men running alongside a burnt-out tank. Despite the apparent drama of action under fire, however, careful observers would note that the tank was actually a Sherman, the footage having been shot well behind the frontlines.⁴⁰ Moving ahead, Radcliffe's patrol soon ran into unexpected difficulties and narrowly escaped intense machine gun fire as well as heavy tank fire, but ultimately found cover behind a 12-foot wall until they were later rescued by an anti-tank unit.

Fighting its way through tough resistance on the outskirts of the city, on 4 June the FSSF thus made the first permanent entrance of Allied soldiers into Rome, ending a day of intermittent street fighting during which the unit captured eight of the city's bridges over the Tiber. War correspondent Eric Sevareid later recalled Frederick as having received orders to speed up the advance so that General Clark could be at a photo-shoot by 4 pm. Clark got what he was looking for -- a photo taken beside a road sign marked "Roma" and with it the glory of being first into Rome (or, as Sevareid termed it, "the conqueror within his conquered city)."⁴¹ Clark's victory speech to a horde of correspondents paid tribute to Fifth Army -- but made no mention of the FSSF, or other Allied units that had been essential to the breakout from Anzio.⁴²

With Rome in Allied hands, Frederick now had an opportunity to consider the "lessons learned" on the road from Anzio to Rome. These essentially reinforced his belief that it had not been possible to train FSSF replacements to the standard of the original personnel. No amount of enthusiasm on the part of these volunteers could equal the full year of intense training provided to the original Forcemen at Helena, Montana. Second, it was immediately apparent that armoured and artillery support had been absolutely crucial to the success of recent FSSF operations -- just as these supporting arms would be for any conventional United States infantry regiment conducting conventional infantry battles. Thus, he recommended that the FSSF be organized and equipped as a regular Infantry Regiment, supported by a battalion of light Field Artillery.⁴³ A few days later, Frederick left the unit upon his pro-

motion to Major-General and commander of the First Airborne Task Force in the upcoming invasion of Southern France -- a mission in which, owing to the mass influx of non-parachute trained replacements into the Force, the unit would find itself tasked with an amphibious rather than an airborne role.

Media Attention in Southern France

In July, General Clark endorsed Frederick's recommendations for reorganizing the FSSF. Recent temporary attachments to the unit of field artillery, combat engineers, and medical services were made permanent and the Force reorganized as an infantry regimental combat team.⁴⁴ In mid-August the FSSF was shipped to Southern France to take part in an amphibious landing in support of Operation DRAGOON, the opening of a second European front. Landing on Île de Port Cros on 15 August 1944, the Force went on to complete its mission by taking Île du Levant on 18 August. Throughout these operations, there was full media coverage that included tributes to the binational nature of the FSSF.

To this point, news reports had told of the exploits of the Devil's Brigade but little was known of their actual identity. Media attention increased, however, as publication restrictions continued to be lifted. The *Denver Post* released further details in early August:

'Frederick's Freighters' sound like a force of supermen. They are a self sufficient force, trained to carry their own equipment with them. Hence the name..... This article might sound as if they were the only real fighters in Italy. That, of course, is not true. But for the last seven months, this spearhead outfit, as far as the public knows, hasn't even been in the Tyrrhenian boot. Chalk it up to security reasons. But now the truth can be told.⁴⁵

In news reports of 22 August, coverage of the FSSF landings in Southern France also revealed that their training had taken place in Helena, Montana. Clinton Conger, writing for the *Montana Standard*, provided newly-released details of the Force in his article, "Veil of Secrecy Is Lifted on Special Service Command that WAS Activated, Trained in Montana." Here Forcemen were described as heroes, commandos, and the bravest of the brave. Conger described their unique record in the Anzio beachhead as one of dealing out misery to German troops, including their use of threatening stickers left behind during nighttime raids. These "calling cards" carried a reproduction

of the Force emblem, an arrowhead, and the German-language message *Das Dicke Ende Koomt Nocht* – “The Worst is Yet to Come”. Conger reported that these stickers were left on German soldiers who had been killed during the night, often with the sleek V-42 daggers used by Force personnel. They were also left as warnings on destroyed German guns, and on one occasion, on the door of a German command post.⁴⁶

A month and a half after the DRAGOON landings, operational coverage was becoming more current. In the *Toronto Star* of 7 October 1944, Conger wrote from “somewhere in Southern France”:

Since their dramatic, three-month performance at Anzio beach-head, everybody knows them. The Allied armies in Italy know the men of the force by their special, baggy-panted mountain uniforms and shoulder patches. The public back home knew them during Anzio as the combined Canadian-U.S. combat group.... Finally, they completely released their organizational name and history after they landed in France.... To me, during the fortnight I spent with the force in southern France, the outstanding thing about it is its spirit of offence. These men are trained to fight in forests, on mountains or in snow, and always to attack.⁴⁷

Disbandment and a Legacy

It is ironic that just as this fame was being achieved, negotiations for disbandment of the Force were underway. Throughout the autumn of 1944, Colonel Edwin A. Walker, Frederick’s replacement as Force Commander, fought a rearguard action to save the FSSF as a special unit, but his efforts were ultimately doomed to failure. Although Walker repeatedly attempted to retain the Canadian element of the Force, both Canadian and American authorities now agreed with Frederick’s earlier assessment that the bi-national composition of the Force introduced unnecessarily complex difficulties for the unit. On 7 October 1944, the same day that Conger’s tribute was published in the *Toronto Star*, Lieutenant-General Kenneth Stuart, Canadian Chief of Staff, Canadian Military Headquarters, wrote:

“This unit appears now to be submerged to such an extent with the U.S. forces that the value to Canada of its retention is no longer apparent.... I recommend that the Canadian element of the Special Service Force be disbanded and that the personnel be returned to the U.K. for reallocation.”⁴⁸

Concrete administrative and reinforcement difficulties had come to outweigh the more ephemeral and sentimental advantages keeping the FSSF active as a “North American” military formation.

Even in disbandment, diplomatic messages flew back and forth between Washington and Ottawa to ensure that the disbandment of the unit remained secret. The US Chief of General Staff requested the Commander of Canadian Army Staff to maintain close contact with Washington “so as to ensure that no publicity will be given until we have had the opportunity of seeing and agreeing to any Press Release which may be proposed.”⁴⁹ In passing on the top secret message to Major-General P.J. Montague, Chief of Staff at Canadian Military Headquarters, Lieutenant General J.C. Murchie in turn stressed the importance of “ensuring no publicity whatsoever given this disbandment until advised by this HQ.”⁵⁰ It seems that the Force had come full circle – from its top secret origins, it had progressed to the point of becoming a source of pride for both Canadians and Americans, but was now returning to obscurity in the face of dissolution of this proud regiment.

In recognition of “the outstanding service given by this unit in the past, and the good showing made on the field of battle,” Montague urged that “every consideration should be given the unit when carrying out this disbandment.”⁵¹ On 5 December 1944, the First Special Service Force came to an end after a final parade in Villeneuve-Loubet, France, at which time the Canadians were returned to their own army and the American element reorganized to form the 474th Infantry Regiment, complete with its own anti-tank company, heavy machine guns, mortars, and vehicles – all the supporting elements deemed necessary for the type of conventional infantry operations the unit was now finding itself assigned to. The Canadians, meanwhile, were ordered to fall out and form a separate battalion, at which time the command was given for the Americans to close ranks after the Canadians stepped out. Instead, the men remaining in the lines held their position, leaving the empty Canadian spots in their ranks.⁵²

Years later, memories of the day would continue to bring great sadness to Forcemen who had built a unit not divided as “Yanks or Canucks,” but rather one characterized by a unique *esprit de corps* and an enduring bond between the soldiers of two nations. At the height of his media coverage of the First Special Service Force, *Montreal Star* correspondent Sholto Watt had trumpeted the political benefits of fielding a renowned international unit:

As it exists at present the force is capable of effecting political benefits outside the scope of its military role. Wherever it is known it

must be an inspiration in international goodwill. It could become an object lesson in concrete, human text to the so-long divided peoples of Europe. The force is an intensely dramatic embodiment of our common effort in a cause that commands faith from all of us.⁵³

Now, as the Force was disbanded, Sholto Watt paid a final tribute to the unit:

I can testify to their spectacular power and efficiency, their marvelous morale and their never-failing spirit of attack. They were exactly what one would expect from North America's best – an inspiration to see and a terror to their enemy.... The significance of this Force is that it was the first joint force of its kind, drawn from two neighbor democracies, and that it was a brilliant success throughout.... Their legend will be a feat of arms which will remain celebrated in military history...as an international brotherhood which deserves enduring honor.⁵⁴

During its brief existence, the Force established an enviable combat record – and did so despite the difficulties of its high rate of casualties suffered during the Italian campaign. On the ground, the FSSF proved repeatedly that Canadians and Americans could be molded into an extremely effective fighting unit. Viewed from above, however, the special status and international character of the Force introduced unique difficulties that were never fully resolved before the unit was disbanded in December of 1944. Following the Second World War, the legacy of the FSSF was preserved by Robert Burhans in his detailed operational history, *The First Special Service Force: A War History of the North Americans*. It was popularized twenty years later in Adleman and Walton's *The Devil's Brigade* and David Wolper's Hollywood film of the same name.⁵⁵ The legacy has lived on through modern media coverage of First Special Service Force reunions, and, to our regret as time goes on, in commemorative obituaries. The Black Devil legend will survive as media representation adapts to a new generation that seeks to find meaning in the legacy of this US-Canadian force. Thanks in part to war correspondents who witnessed their determination and skill in action, and the media coverage finally permitted during the last months of the FSSF's existence, it is the legend of a uniquely North American military formation that is most remembered today.

Notes

- 1 Sholto Watt, "Real 'American' Force: Joint U.S. – Canadian Unit Gets Canadian Reinforcements," *Montreal Star*, 25 May, 1944.
- 2 Tom Hope, "First Special Service Force Photo Unit" (Rochester, NY: Hope Reports Inc., 2002), 3. It was later learned that the British had already changed their jump techniques to reduce casualties without informing other Allied forces. The Germans were having the same injury problem with jumpers landing "two feet apart" and had also used slow-motion movies to determine the problem and go to "two feet together" for landing. Hope quotes Field Marshal von Keitel, German Chief of Staff as having said OKW's "major miscalculation was in under-estimating [the Allies'] quick and complete mastery of film education" in military training (p. 9). The full collection of Lewis Merrim's still photographs of the FSSF is available at the Special Warfare Museum, Fort Bragg, NC and many photos can be found at the US National Archives-College Park.
- 3 Telegram, Lt-Col Bud Drury to Lt-Col Anderson, 11 July 1942, Library and Archives Canada (hereafter LAC), RG 24, Series C-1, Reel C-5436.
- 4 Telegram, Lt-Gen Kenneth Stuart to Gen. A.G.L. McNaughton, 12 July 1942, LAC, RG 24, Series C-1, Reel C-5436.
- 5 Statement Issued by Minister of National Defence, 6 August 1942 Teletype EX -1769, Department of History and Heritage (hereafter DHH) 314.009 (D369), File: MSGS Ottawa/Washington re: Premature Announcement of Org of Special Service Force, 6 -7 Aug 1942. This is a first example of crossed-wires and miscommunication that are the subject of much attention in James A. Wood, *We Move Only Forward: Canada, the United States and the First Special Service Force* (St. Catharines, Vanwell Publishing, 2006). Later in the summer of 1942 the highest-ranking Canadian in the FSSF, Lt-Col J.G. McQueen fractured his ankle in a parachute jump and had to leave the Force. He was replaced as second-in-command of the Force by an American. Lt-Col Paul D. Adams. It comes as no great surprise that this was not reported in Canadian newspapers.
- 6 L.B. Pearson to the Hon. Robert P. Patterson, Under Secretary of War, Washington, 6 August 1942, DHH 314.009 (D369), File: MSGS Ottawa/Washington re: Premature Announcement of Org of Special Service Force, 6 -7 Aug 1942.
- 7 L.B. Pearson to Robertson, Ottawa, copy to Major General Pope, 7 August, 1942, DHH 314.009 (D369), File: MSGS Ottawa/Washington re: Premature Announcement of Org of Special Service Force, 6 -7 Aug 1942..
- 8 Memo, CGS to MND, 26 Oct 1942, DHH, 112.352009 (D255), File: Org & Mob, 1st Cdn SpServ Bn, Jun/Dec 42.
- 9 Robert Burhans, *The First Special Service Force: A War History of the North Americans* (Washington, Infantry Journal Press, 1947), 14, 44 and 52. Detailed information of life while stationed in Helena is available from interviews conducted in the fall of 1963 and available in the Robert H. Adleman Papers of the Hoover Institution Archives (hereafter HIA). FSSF legends are kept alive at the Gold Bar which still exists today.
- 10 War Diary of 2nd Cdn Para Bn, 16 January 1943, LAC, RG 24, Vol. 15301.
- 11 Interview, Finn Roll, September 23, 1963, HIA, Adleman Papers, Box 10, File: Headquarters – Interviews. Finn Roll, an American, was living in Oslo at the outbreak of the war. He escaped in a small boat after the German occupation. His father, a former US Consul in Norway, was later killed by Quislings while working with the

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- Norwegian underground (Burhans, 18). Lt-Col Paul D. Adams and Lt-Col Kenneth Wickham were the FSSF Executive Officers.
- 12 Interview, Kenneth G. Wickham, HIA, Adleman Papers, Box 12, 16 December 1963, File: Interviews, Misc.
- 13 Memorandum, Maj-Gen Maurice Pope to Lt-Col D.D. Williamson, 14 June 1943, DHH 145.3009 (D5), File: Org & Admin Corresp & Instr, Jul 42- Dec 44. The "Zombies" of the National Resources Mobilization Act, conscripted for home-defence, could be mobilized for North American service.
- 14 "Allies Occupy Segula Near Kiska; Isle May Serve as Landing Field," *New York Times*, 24 August 1943, 2.
- 15 Sidney Shalett, "U.S. – Canadian Forces Take Kiska," *New York Times*, 22 August 1943, 1; "Canucks Help Retake Kiska," *Toronto Globe & Mail*, 22 August 1943; "Joint Statement on Kiska is Issued – Roosevelt and Mackenzie King Announce Recapture of Island from Enemy," *New York Times*, 22 August 1943; John Dauphinée, "Canada, U.S. Take Kiska," *Toronto Globe & Mail*, 23 August 1943; "War Seasoned Officers Lead Kiska Units," *Toronto Globe & Mail*, 23 August 1943; Morley Cassidy, "Canadians in Kiska Force Adopt U.S. Army Insignia to Link Units," *New York Times*, 30 August 1943, 5.
- 16 "Canadians Have 2nd Pacific Show – Cooperate With Americans in Re-occupation of Kiska" – Use U.S. Equipment," *New York Times*, 22 August 1943, 6.
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- 18 Matthews, "New Drive in Italy – Americans and Britons Push Germans From Series of Peaks," *New York Times*, 5 December 1943, 4.
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- 20 Ralph Allen, "Allied Armies Drive Ahead on Flanks in Italy," *Globe & Mail*, 6 December 1943, 1.
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- 22 Interview, Angus Bush, 23 October, 1963, HIA, Adleman Papers, Box 14, File: Service Battalion (Maintenance) Interviews.
- 23 Commendation, Lt-Gen Mark W. Clark to Commanding Officer, FSSF, 10 December 1943, LAC, RG 24, Vol. 12,540, File: Org & Admin, 1Cdn SS Bn.
- 24 Milton Bracker, "Allies at Gate to Rome Valley," *New York Times*, 9 December 1943, 1.
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- 27 Watt, "Sturdy, Hard-Hitting Canadian-American Army Unit Writing New Military History," *Montreal Star*, January 1944, released 6 April 1944.
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- 29 Watt, "Crack Mixed Force," 9 April 1944.
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Cherbourg Peninsula Revisited: A Model of U.S. Combined Operations for the Canadian Army

Alexander W.G. Herd

During the Second World War, Canada strengthened its political, military, and economic ties to the United States—a process that continued unchecked through the first post-war decade. On the battlefield, the only Canadian Army unit to serve under direct U.S. military command was the 1st Canadian Special Service Battalion of the joint 1st Special Service Force, the subject of James Wood's chapter in this volume. However, with the war's end, it was evident that the Canadian Army had begun an institutional shift closer to its American counterpart and away from its British parent. This shift was illustrated in the large planning exercise held at the Canadian Army Staff College (CASC) in Kingston, Ontario in March 1947. The exercise, Operation GULLIVER¹ (7-21 March 1947), was based on the U.S. Army VII Corps' OVERLORD landings and operations to take the port of Cherbourg on the Cotentin Peninsula in June - July 1944. British operational planning methods were applied in this exercise; however, this exercise was less about learning these methods than it was about gaining a working knowledge of the recent Anglo-American planning for Operation OVERLORD in 1944, and how a British-style organization such as the Canadian Army could undertake an American military operation. Significant historical revisionism was required for the Cotentin operation to be practicable within Canadian parameters. Overall, GULLIVER revealed a "Canadian perspective" of a Second World War American military experience.

At the CASC, student officers learned the professional skills required for higher appointments. The CASC was a centre of shared doctrine, predominately between the Canadian, British, and American armed services. The 1947 Combined Operations series, one of many series during the year-long staff course, best reflected this educational exchange and was organized around two major periods – a "British phase" in February and March, in which British combined operations experts led the instruction, and an "American phase" in April, a separate sub-series on amphibious operations run by U.S. Marine Corps officers. Significantly, GULLIVER took place during the British phase.

The purpose of Operation GULLIVER was to teach student officers the importance of tri-service coordination in modern operations, accomplished through detailed joint planning. The exercise was divided into six phases. Phase 1 consisted of demonstrations that set the strategic, military, and political context of the exercise. These plays showed the conception of a combined operation at the Prime Minister/Chiefs of Staff level and included the operational briefing of the three Force Commanders—the army officer in command of the operation and his naval and air force counterparts. The actors were CASC Directing Staff (DS), British instructors, and officers from the Royal Canadian Navy (RCN) and Royal Canadian Air Force (RCAF). The critical component was in phase 2, when the Force Commanders worked out the “Initial Joint Plan” that incorporated the inter-service aspects of a combined operation. This plan was the basis for student officers’ work in phases 2 through 5, in which the students, appointed as corps, division, brigade, or unit staffs, worked out further outline plans according to the material produced at the previous level. Phase 6 concluded the exercise with a discussion of lessons learned and a historical account of the U.S. Army VII Corps’ Cotentin operations in 1944.

CASC leaders chose the Cotentin operations for GULLIVER primarily because of their access to VII Corps’ Cherbourg plans, air photographs, intelligence, and models of the peninsula area.² There were also practical reasons based on the recent wartime experience of First Canadian Army, an organization of two corps of five divisions and two armoured brigades. In GULLIVER, students planned an assault on France in which a “strong corps,” consisting of one assault division, two follow-up divisions, and a build-up division, supported by a naval assault force and a Royal Air Force (RAF) tactical group, seized a lodgement area.³ For CASC officials, the Cotentin Peninsula made “the strategical conception of a lodgment in FRANCE by one corps a tactical possibility”; the peninsula offered “good l[an]d[in]g beaches, plenty of room for assembly of a large force incl[uding] air [forces], a good all-weather, deep sea port with a sheltered anchorags [*sic*], and excellent ground for the def[ence] at the peninsula neck.”⁴ Most importantly, the U.S. Army VII Corps’ activities in summer 1944 represented recent, successful combined operations conducted by an *army* organization. However, in view of the requirements of an army smaller than its American counterpart, CASC officials revised history to meet the educational aims of Operation GULLIVER. The result was the “Canadian perspective” of the Cotentin operations.

A summary of VII Corps’ initial Normandy venture will place the ‘Canadian perspective’ in context. In October 1943, VII Corps arrived in

the United Kingdom as part of the build-up of U.S. combat divisions for the attack against German-occupied Western Europe. VII Corps was assigned to First U.S. Army under Lieutenant-General Omar N. Bradley. Along with Second British Army, First U.S. Army was part of General Sir Bernard L. Montgomery's 21st Army Group, responsible for the ground assault phase of Operation OVERLORD.⁵ In January 1944, it was Montgomery who, in his push for a larger cross-channel assault than had been previously planned, wanted the early capture of Cherbourg because he did not want the Allied forces to rely on artificial ports for their maintenance and re-supply.⁶

American units were given the task of capturing Cherbourg and, in February 1944, the Allies solidified their plans to take the Cotentin. Originally, the Allies planned to push their Bessin-Caen bridgehead deep to the south and southwest and then break out northwest into the peninsula and take Cherbourg. The problem was that the Douve River's marshlands, located at the bottom of the peninsula, were subject to inundation and, crossed by only three main roads, created an "easily defended moat across about five-sixths of the peninsula."⁷ Therefore, new plans called for an assault on the peninsula, simultaneous with the other landings, to establish Allied forces north of the Douve River line on the peninsula neck.⁸ In this plan, VII Corps would clear the low-rolling country of the south Cotentin as far west as the Douve, then push against the high ground of the north Cotentin, establishing a line around Cherbourg by D plus 2. Allied commanders expected to take Cherbourg on D plus 15.⁹

In June 1944, two American airborne divisions assisted VII Corps' landings at UTAH Beach, on the peninsula's southeastern coast. While the 101st Airborne Division was dropped west of the beach, the 82nd secured a bridgehead west of the Merderet River, a body of water that connected with the Douve at the junction of the latter's western and southern marshlands.¹⁰ Once landed, VII Corps' operations on the Cotentin Peninsula divided into two periods. In the first, 8-18 June 1944, through "hard slugging," the Corps broke out of the German ring established against its D-day bridgehead. In the second, 18 June – 1 July 1944, VII Corps achieved a "swift and dramatic" victory with the capture of Cherbourg.¹¹

The first period began with VII Corps attacking to the north, along the east coast, to silence enemy batteries that fired on the landing beaches and to widen its base of attack for the drive westward across the peninsula.¹² Between 8 – 14 June, the U.S. Army's 4th Infantry Division and the 505th Parachute Infantry Regiment, 82nd Airborne Division pursued these objectives. They faced the German Seventh Army's LXXXIV Corps; in the eastern

zone, the defenders were three *Kampfgruppen* formed of units primarily from the German Army's 709th, 243rd, and 91st Divisions. These units were well supported by artillery, but suffered from an ammunition shortage and constant Allied air and naval bombardment. The U.S. Army VII Corps accomplished its east coast objectives with the help of these air and naval attacks, along with the U.S. Army 39th Infantry Regiment's clearing of the fortified beach and coast.¹³

As its northern flank was secured, VII Corps began to split enemy forces on the peninsula. On 10 June, the 90th Infantry Division attacked westward, towards the north-south axis of the Douve River, in the middle of the Cotentin. By 13 June the division had not progressed as quickly as planned.¹⁴ Consequently, VII Corps Commander Major-General J. Lawton Collins altered the attack scheme, with the 9th Infantry and 82nd Airborne Divisions undertaking the main thrust west.¹⁵

Thereafter, Collins' cutting of the peninsula was facilitated by ever-weakening German defences and Hitler's own policy, enunciated at a meeting in France with his field marshals on 17 June, ordering the rigid defence of every inch of ground, including the holding of Cherbourg at any cost. As a consequence, higher command retracted LXXXIV Corps plans to move the German 77th Division, at the time defending Cherbourg, south to stop the Americans' westward push. Ultimately, the 77th Division was sent to the town of la Haye du Puits, in the southwest part of the battle area. This move was made too late to strengthen the Germans' right flank.¹⁶ Moreover, the 77th Division paid a heavy toll. On 18 June the U.S. 9th Infantry Division destroyed elements of the German formation as they attempted to pass south along the peninsula's west coast.¹⁷

On 19 June 1944 the U.S. Army VII Corps began its attack on Cherbourg. VII Corps' full combat strength was committed to the attack, as the 9th Division advanced on the west side of the peninsula, the 4th Infantry Division on the east, and the 79th Infantry Division up the middle, with other units in support. By the end of 21 June American units had reached the Cherbourg *Landfront*—southern defensive perimeter of the Cherbourg Fortress.¹⁸ Following U.S. and British air attacks against the Fortress, on 22 June the three divisions resumed their attack on Cherbourg, facing their stiffest resistance yet, as enemy defenders heeded Hitler's last stand policy. On 23 June American forces penetrated the outer ring of Cherbourg's defences; the next day these defences began to collapse; on 25 June U.S. units infiltrated the city proper; and on 27 June organized resistance within Cherbourg ceased as First U.S. Army achieved its primary objective in OVERLORD's assault

phase.¹⁹ The capture of Cherbourg was followed by operations to mop up enemy points of resistance east and west of the port.²⁰

The “Canadian perspective” of these operations was outlined in two CASC documents. One document was Operation GULLIVER’s “opening narrative,” issued to students at the beginning of the exercise.²¹ According to this story, planning for GULLIVER began in January 1943 as the Allies in North Africa closed on Tripoli and the Russian winter offensive slowed down.²² CASC officials believed that this timeline allowed students “to work with a realistic enemy in a realistic situation,” with the caveat that combined operations techniques developed subsequent to 1943 would be employed.²³ The story also stated that, at the Allies’ January 1943 Casablanca Conference, British Prime Minister Sir Winston Churchill “committed himself to a spring as[sau]lt on the [European] mainland to relieve the pressure on the Russian Front and to tie in with the Sicilian as[sau]lt planned for Jul[y].”²⁴ In this scenario, the Soviets had pressed Churchill and U.S. President Franklin D. Roosevelt to open a western front that spring because, after the battle of Stalingrad, they sought to undermine the next German offensive against Russia by diverting enemy resources away from the east.²⁵

The narrative explained that the assault on Europe’s west coast was not to be an all-out landing but the seizing of a lodgement area “within which adequate forces could be built-up to start a land offensive.”²⁶ As American participation in the initial assault was not possible because of their need for assault divisions in the Pacific, the Americans would supply the build-up forces to break out across France through their “surfeit” of armoured divisions in England, while British armoured formations were busy in North Africa.²⁷ Therefore, Roosevelt committed significant build-up forces for the lodgement area, to arrive either in late August or mid-September 1943.²⁸ In consultation with his Chiefs of Staff, Churchill agreed that the Cotentin Peninsula was the best operational target for the lodgement area.²⁹ Moreover, because of a shortage of American and British assault troops in the UK, the only available assault-trained forces there were Canadian. Apparently, Churchill was very enthusiastic about Canadian participation, being impressed with a combined operations exercise by the Canadian Army’s “Third Division” and because “there was the old score of DIEPPE to settle.”³⁰ The stage was set for an assault by the independent corps-strength force against the Cotentin.

In the first part of the “Canadian perspective,” the statement “realistic enemy in a realistic situation” most likely referred to the relatively weak state of German forces in France and that the German Army’s 243rd and 709th Divisions were the primary defenders of the peninsula in 1943.³¹ After the

Allies' failed Dieppe assault in 1942, Hitler prioritized the construction of the Atlantic Wall, a massive, concrete-based defence to ward off further Allied landings, or make it impossible for Allied forces to move inland. The Atlantic Wall, however, never became the impregnable defence advertised in German propaganda. Additionally, in 1943, the combat quality and ability of German forces behind the Wall were severely undermined by the military situation on both the Russian and Mediterranean fronts. Beginning in late 1941, while the best German units were sent east to try to stem the losses suffered at that front, they were replaced in the west by others of poor combat quality, largely composed of inexperienced, disabled, or "foreign" troops. Meanwhile, in November 1942, the Allied landings in North Africa led to German units being sent south, and as the Allies advanced through Italy in 1943, still more German divisions were moved from the west. Finally, by the end of 1943, Hitler and his generals had failed to reach an unequivocal decision on German defensive tactics in the west because of significant differences among them, generally over employing static defence versus more traditional German mobile operations and counterattacks.³²

By the following summer, the situation had changed. Between summer 1943 and spring 1944, 20 divisions were added to the western front; in May 1944, the Allies estimated that there were 60 enemy divisions in France and the Low Countries.³³ That same month, the German Army's 91st Division moved onto the Cotentin to bolster its defences.³⁴ The Allies decided to go ahead with OVERLORD because, despite these defensive moves, it was estimated that the Germans' maximum effort was insufficient to beat back the Allies.³⁵ CASC officials therefore believed that it was a realistic exercise if GULLIVER's independent Canadian corps faced the German forces on the Cotentin during the first half of 1943.

Of course, up-to-date combined operations techniques would help student officers' plan for the corps' assault and provide them with the appropriate knowledge. This was not only a pragmatic consideration, but also a historical one. Tactical amphibious assault methods were refined up to the last stages of OVERLORD's preparation. The British Combined Operations Headquarters (COHQ) had experimented with assault tactics since 1940, in order to solve the "special technical problems" of a cross-channel attack.³⁶ Beginning in spring 1942, U.S. and British officers had worked together to produce a combined amphibious doctrine "specially adapted to the conditions of the Channel assault."³⁷ In April 1943, the Assault Training Center was established to test new tactical ideas and techniques and integrate them into the training of the troops earmarked for the assault. Beginning in

September 1943, all U.S. troops set for OVERLORD went through the Center, whose staff continued to modify and improve tactical methods up to D-day.³⁸ Moreover, in early 1944 the Allies created specially organized assault divisions by reducing the number of men and vehicles in normal infantry divisions, while increasing the infantry's firepower.³⁹ The purpose was to overcome the Germans' expected measures against a cross-channel attack, in which the stubborn defence of the fortified coastal zone was followed by German counterattacks to drive the Allies back into the sea.⁴⁰ Therefore, the Allied divisions were designed to smash through the enemy's coastal defences, carrying the assaulting troops far enough inland to permit follow-up forces to consolidate and then exploit the beachheads.⁴¹ Hence, GULLIVER's application of combined operations techniques developed and tested by fire after summer 1943.

As for the GULLIVER narrative's comments on Casablanca, at the actual Casablanca Conference, which began on 12 January 1943, Churchill had not sought an Allied assault on Northwest Europe; rather, he wanted to exploit the recent victories in North Africa with operations in the Mediterranean area. American military officials disagreed. The U.S. section of the Combined Chiefs of Staff was divided over when and how to undertake a cross-channel assault, but General George C. Marshall, its leader, firmly believed that to ultimately defeat Germany, the Allies must push through Northwest Europe, not the Mediterranean. The Americans supported the invasion of Sicily that summer to help the Russians on the Eastern Front and because they had large numbers of U.S. troops available in North Africa for that invasion. However, Marshall saw the Mediterranean operations as a temporary expedient, not a departure from his commitment to making France the scene of the Allies' main effort.⁴² The Allies at Casablanca did agree on one item. A cross-channel invasion appeared unlikely until fall 1943 at the earliest.⁴³ This fact, along with the U.S. Chiefs' desire, expressed at Casablanca, to build up American forces in the Pacific,⁴⁴ was the basis for the GULLIVER narrative's statement that U.S. forces were unable to participate in that operation until late 1943.

The other document that expressed the "Canadian perspective" was a 1946 CASC memorandum that had initially proposed Operation GULLIVER. This memorandum included an outline plan of GULLIVER that contained the information from which Force Commanders created the Initial Joint Plan. The outline consisted of three phases, the details of which followed unit movements stencilled in on an accompanying traced map of the Cotentin Peninsula.⁴⁵ In the assault phase, the attacking formations seized a line represented as "D plus 3," while the follow-up infantry and armoured divisions

assembled in this bridgehead. This outline also allowed for the possible use of an airborne division; if employed, these forces were to be dropped into the area of the town "LA HAYE DU PUIITS."⁴⁶

In the break out phase, the follow-up infantry division broke out of the bridgehead, seized "LA HAYE DU PUIITS," and took over the airborne division's defensive position to the south of the town. Meanwhile, one brigade of the assault division took up a defensive position on the southern edge of the bridgehead, while another assault brigade, along with an independent armoured brigade, went into corps reserve near the town of "ST SAVEUR" in the centre of the corps zone.⁴⁷ Additionally, a third assault brigade turned north and went under the command of the follow-up armoured division, which had broken out of the bridgehead to the west and turned north to contain the enemy forces around the port of Cherbourg.⁴⁸

In the final phase, consolidation, the build-up division, having landed about ten days after D-day, took over the attack on Cherbourg from the armoured division and then deployed, in a coastal defence role, over the peninsula's north end. The armoured division moved into corps reserve in preparation for the main enemy counterattack expected on "D plus 15," while the original assault division thickened up its defensive positions. The outline also included additional information on the Cotentin Peninsula. First, the ground on which the corps would operate was the Cotentin Basin, low lying, flat country, not heavily wooded but with rivers, streams, and dykes that made the area suitable for defence. Secondly, a blue area on the map denoted ground capable of inundation; therefore, only a "very light force" was necessary to defend this area.⁴⁹ Finally, the extensive network of roads that lead to the peninsula passed through large urban centres that Allied bombers would target—heavy bombers against these centres' marshalling yards and tactical (medium) bombers against their railway stock.⁵⁰

In comparison to actual historical events, the outline plan and its map are quite rudimentary, but such a comparison also reveals more of the factual modifications made to suit GULLIVER's educational purposes. There were some similarities. Like the U.S. Army VII Corps, the outline plan's assault division was accompanied by an airborne unit—in 1944, the initial Cotentin attacks were made by the 4th Infantry Division and the 82nd Airborne Division. Moreover, the "D plus 3" bridgehead on the map approximated VII Corps' forward positions that these divisions reached by the evening of 9 June 1944.⁵¹ Additionally, the outline plan's follow-up infantry and armoured divisions broadly represented the actions of the U.S. 9th and 90th Infantry Divisions in the field. The follow-up armoured division closely simulated

the moves by the 90th Division, which had been originally tasked with VII Corps' westward push across the peninsula, before being ordered north to protect the flank of this push. Finally, the outline plan's build-up division generally reflected the U.S. 79th Infantry Division. Both historically and in the imagined scenario, these formations played a key role in the attack on Cherbourg.

The outline plan's notes on terrain, the inundation area, and the bombing of urban areas were also historically accurate. The inundation area represented the Prairies Marécageuses de Gorges, the marshlands into and through which the Douve and Merderet Rivers flow in the southeast and south central parts of the peninsula neck.⁵² Additionally, Allied air attacks were instrumental in facilitating VII Corps' advance north against enemy defences. During the Normandy invasion, German transportation capacity was severely limited by effective air attacks against the region's bridges and railway networks.⁵³

The differences between the real and imagined operations were, however, more considerable. The proposed map simplified historical realities, such as placing the bridgehead line further inland than what was actually achieved by 9 June 1944. The map line was just short of a city in the middle of the Cotentin that represented St. Sauveur-le Vicomte, which was not reached by units of the 82nd Airborne Division until 16 June 1944.⁵⁴ The city of la Haye du Puits, meanwhile, located to the far southwest of VII Corps' zone, was not a factor during the actual Cotentin invasion. Neither the 82nd Airborne Division's initial actions nor the follow-up by the 9th Infantry Division, which reached the peninsula's west side by 18 June 1944, led VII Corps to the vicinity of this urban centre, which was beyond the extent of its Cotentin operations.

Different types of combat formations were also used. The proposed plan mentioned brigades, more typical of Anglo-Canadian military forces than the U.S. Army's regimental system. Additionally, VII Corps' attacks were primarily conducted by infantry divisions supported by tanks and artillery. In the outline plan, the corps consisted of infantry and armoured formations, similar to First Canadian Army's organization during the Second World War. Moreover, on the Cotentin, the initial move north was made by the 90th Infantry Division; in the CASC scenario this role was tasked to the follow-up armoured division. The outline plan's build-up division led the attack on Cherbourg. It is unclear whether this division was infantry or armoured; the key point is that just one division was responsible for the port. However, it took three U.S. Army infantry divisions to eventually capture Cherbourg in 1944.⁵⁵

This “Canadian perspective” reflected CASC officials’ realistic appraisal of the Canadian Army’s capacity to fight future combined operations, based on the army’s recent wartime experience. The planning exercise also taught students about Operation OVERLORD. GULLIVER concluded with a discussion of British and American Second World War policies on detailed operational planning. British policy – as enacted in GULLIVER – decentralized detailed planning down to the brigade level at which a firm operational plan was made. Therefore, the Force Commanders’ Initial Joint Plan was an operational instruction for lower formations that was modified as it passed down the force hierarchy. American policy established a firm operational plan at the Task Force Commander level, unalterable by lower formations.⁵⁶

The comparison between British and American policy reiterated the historical lesson of Operation GULLIVER. In Operation OVERLORD, the British approach to planning had been applied to the Allied preparations. On 1 February 1944, the NEPTUNE Initial Joint Plan, which set the basis for OVERLORD, was produced by the three force commanders at Supreme Allied Headquarters—Montgomery, Admiral Sir Bertram H. Ramsay, and Air Marshal Sir Trafford Leigh-Mallory. This plan was a directive for all subordinate formations; it first tasked First U.S. Army and Second British Army with submitting their own outline plans. These two armies, along with the operation’s chief air and naval commanders, produced their overall plans within the next two months. These plans then served as a framework for lower formations’ planning. The latter modified the higher level plans, generally issuing them as either field or operational orders.⁵⁷ In GULLIVER, student officers practiced what their forbearers had done in a real operational context less than three years before.

The British-American comparison was also an extension of GULLIVER’s primary educational aim, to show the application of British operational planning principles to an American military operation. This was a pragmatic decision given that the Canadian Army was a British-style organization, but there were broader implications. The CASC study of an American wartime experience was the beginning of the Canadian Army’s increased incorporation of American military doctrine over the next decade. This process was a microcosm of Canadian society in general from the late 1940s to the late 1950s, in which American politics, economics, and culture helped shape Canada’s North American identity. Thus, Operation GULLIVER revealed the post-war Canadian Army’s similar move closer to its American counterpart and away from its British foundation.

Notes

- 1 The exercise's name was explained during one of the instructors' demonstrations that set the "historical" and operational context of student officers' work. According to this play, British Prime Minister Sir Winston Churchill had chosen the operation's name with reference to Jonathan Swift's 18th century work, *Gulliver's Travels*, particularly the account of Gulliver's visit to the land of the Yahoos, "ugly apelike creatures ruled over by very intelligent horses," which Gulliver found repulsive. Churchill allegedly felt the same about the Nazis. *CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40-1 OPERATION GULLIVER LECTURE DEMONSTRATION - FUNCTION OF THE JOINT PLANNING STAFF*, February 1947, CANADIAN ARMY STAFF COLLEGE (CASC) 1946-7 COURSE, Volume 5 COMBINED OPERATIONS, Folio 5, Box 2, 80/71 Canadian Land Forces Command and Staff College (CLF-CSC) Papers, Directorate of History and Heritage (DHH), Department of National Defence, Ottawa (DND), 15.
- 2 *MEMORANDUM COMBINED OPERATIONS - PLANNING STUDY*, 24 April 1946, File 3300-81/1 Part 1 Training - Combined Operations - Canadian Army Staff College 1946-1947, Box 1096, RG 24, Library and Archives Canada, Ottawa (LAC), 4.
- 3 *Ibid.*, 1.
- 4 *Ibid.*, 2. See also *CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40 GENERAL INSTRUCTIONS FOR COMBINED OPERATIONS PLANNING EXERCISE*, March 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFSC Papers, DHH, DND, 5.
- 5 Gordon A. Harrison, *Cross-Channel Attack*, United States Army in World War II; European Theater of Operations (Washington, D.C.: Center of Military History, United States Army, 2002), 158.
- 6 *Ibid.*, 166.
- 7 *Ibid.*, 181-182. Quote is from page 182.
- 8 Harrison, *Cross-Channel Attack*, 182.
- 9 *Ibid.*, 187-188. "D plus 2" was two days after D-day, the first day of operations; therefore, "D plus 15" was 15 days after D-day.
- 10 Harrison, *Cross-Channel Attack*, 185-186.
- 11 *Ibid.*, 386.
- 12 *Ibid.*
- 13 *Ibid.*, 386-396. See also "Securing the North Flank, 8-14 June 1944," in Harrison, *Cross-Channel Attack*, map XX. The 39th Infantry Regiment was part of the 9th Infantry Division, a follow-up formation that landed on 11 June 1944. The next day, the VII Corps Commander, Major-General J. Lawton Collins, committed this regiment to battle. Harrison, *Cross-Channel Attack*, 392. As CASC student officers learned in 1947, naval and air support were critical elements to the 1944 D-day landings and operations thereafter. VII Corps' initial achievements on the peninsula were largely helped by naval gunfire that neutralized the German guns at Quinéville, which overlooked the landing beaches, and the town's bombardment by thirty-six A-20 medium bombers. *Ibid.*, 392-393.
- 14 The 90th Division's slow pace was partly due to the improper application of training lessons and partly due to the hedgerow country encountered on the Cotentin, as throughout Normandy. Harrison, *Cross-Channel Attack*, 396-402; and "Attack to Cut the Peninsula, 10-18 June 1944," in *ibid.*, map XXI.
- 15 Harrison, *Cross-Channel Attack*, 403.
- 16 *Ibid.*, 406-415.
- 17 *Ibid.*, 415-416; and "Attack to Cut the Peninsula, 10-18 June 1944."
- 18 Harrison, *Cross-Channel Attack*, 416-422; and "The Advance North, 19-21 June 1944," in *ibid.*, map XXII.

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- 19 Harrison, *Cross-Channel Attack*, 422-438; "The Advance North, 19-21 June 1944"; and "The Attack on Cherbourg, 22-26 June 1944," in Harrison, *Cross-Channel Attack*, map XXIII.
- 20 Harrison, *Cross-Channel Attack*, 438-441.
- 21 CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40 GENERAL INSTRUCTIONS FOR COMBINED OPERATIONS PLANNING EXERCISE, March 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND, 4-5.
- 22 *Ibid.*, 4.
- 23 MEMORANDUM COMBINED OPERATIONS - PLANNING STUDY, 24 April 1946, File 3300-81/1 Part 1, Box 1096, RG 24, LAC, 2.
- 24 *Ibid.* See also CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40 GENERAL INSTRUCTIONS FOR COMBINED OPERATIONS PLANNING EXERCISE, March 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND, 4.
- 25 CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40-1 OPERATION GULLIVER LECTURE DEMONSTRATION - FUNCTION OF THE JOINT PLANNING STAFF, February 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND, 10-11.
- 26 CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40 GENERAL INSTRUCTIONS FOR COMBINED OPERATIONS PLANNING EXERCISE, March 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND, 5.
- 27 CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40-1 OPERATION GULLIVER LECTURE DEMONSTRATION - FUNCTION OF THE JOINT PLANNING STAFF, February 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND, 11.
- 28 CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40 GENERAL INSTRUCTIONS FOR COMBINED OPERATIONS PLANNING EXERCISE, March 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND, 5; and MEMORANDUM COMBINED OPERATIONS - PLANNING STUDY, 24 April 1946, File 3300-81/1 Part 1, Box 1096, RG 24, LAC, 2.
- 29 CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40 GENERAL INSTRUCTIONS FOR COMBINED OPERATIONS PLANNING EXERCISE, March 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND, 5.
- 30 CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40-1 OPERATION GULLIVER LECTURE DEMONSTRATION - FUNCTION OF THE JOINT PLANNING STAFF, February 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND, 13.
- 31 The latter was reflected in the exercise curriculum. See ANNEXURE 1 TO SECTION 2, PART 2 INTELLIGENCE DOSSIER 125 OPERATION GULLIVER OUTLINE ORDER OF BATTLE OF 709 AND 243 INFANTRY DIVISIONS, n.d., CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND.
- 32 For the complete story on the German Army in France between 1940 and 1943, see Harrison, *Cross-Channel Attack*, 128-157.
- 33 Harrison, *Cross-Channel Attack*, 174-175.
- 34 *Ibid.*, 186.
- 35 *Ibid.*, 180.
- 36 *Ibid.*, 162.
- 37 *Ibid.*
- 38 *Ibid.*, 162-164. The first training courses were at Woolacombe, on the southwest tip of the UK, in North Devon where

- the British School of Combined Operations (SCO) was also located. It was the SCO that sent a team of instructors for the British phase of the 1947 CASC Combined Operations series.
- 39 Harrison, *Cross-Channel Attack*, 192.
- 40 Ibid., 176.
- 41 Ibid., 191.
- 42 Ibid., 38-45.
- 43 Ibid., 41.
- 44 The U.S. Chiefs sought this build-up to enable American offensives to curb further Japanese advances in the Pacific. Ibid., 43-44.
- 45 *PROPOSED PLAN - TRACE P*, n.d., File 3300-81/1 Part 1, Box 1096, RG 24, LAC. In the 1947 exercise, the operational plan was expanded to four phases; a preliminary phase, in which the Royal Air Force attacked the Luftwaffe, its airfields, and enemy rail facilities and beach defences prior to D-day, preceded the three described in the earlier memorandum. See *CANADIAN STAFF COLLEGE COMBINED OPERATIONS 40-2 LECTURE DEMONSTRATION - BRIEFING FORCE COMMANDERS*, March 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND, 13-14.
- 46 *MEMORANDUM COMBINED OPERATIONS - PLANNING STUDY*, 24 April 1946, File 3300-81/1 Part 1, Box 1096, RG 24, LAC, 2.
- 47 Ibid., 3. This town is marked as "ST. SAVAR[sic]" on the map. *PROPOSED PLAN - TRACE P*, n.d., File 3300-81/1 Part 1, Box 1096, RG 24, LAC.
- 48 *MEMORANDUM COMBINED OPERATIONS - PLANNING STUDY*, 24 April 1946, File 3300-81/1 Part 1, Box 1096, RG 24, LAC, 3.
- 49 Ibid. It was noted that the area of inundation had "been put in from memory but will be checked carefully from plans."
- 50 *MEMORANDUM COMBINED OPERATIONS - PLANNING STUDY*, 24 April 1946, File 3300-81/1 Part 1, Box 1096, RG 24, LAC, 3.
- 51 See "Attack to Cut the Peninsula, 10-18 June 1944."
- 52 Ibid.
- 53 Harrison, *Cross-Channel Attack*, 408, 410-411.
- 54 Comparing the proposed map with those of the U.S. Army official history, it is clear that "ST. SAVAR[sic]" represented St. Sauveur-le Vicomte and not the town of St. Sauveur-de-Pierre-Pont, located to the southwest of the former. St. Sauveur-le Vicomte was represented on the CASC map because it was a major VII Corps objective. See *PROPOSED PLAN - TRACE P*, n.d., File 3300-81/1 Part 1, Box 1096, RG 24, LAC; and "Attack to Cut the Peninsula, 10-18 June 1944."
- 55 One other difference related to German counterattacks. In contrast to the CASC plan's large German counterattack on D plus 15, in early 1944 Allied planners expected this counterattack to occur any time after D plus 3. See Harrison, *Cross-Channel Attack*, 176, 351-352.
- 56 *CANADIAN STAFF COLLEGE COMBINED OPERATIONS PLANNING EXERCISE CENTRAL CONFERENCE*, March 1947, CASC 1946-7 COURSE, Volume 5, Folio 5, Box 2, 80/71 CLFCSC Papers, DHH, DND.
- 57 Harrison, *Cross-Channel Attack*, 173-174. The Armies' outline plans included regimental frontage with objectives, commando and airborne tasks, lists of beach defence targets with timing for fire support, and the number of men and vehicles to be landed in each regiment or brigade on the first four tides with the required number and types of landing craft.

Mechanization, Mountains and Mules: A Reassessment of Canadian Participation in the Italian Campaign

William Pratt

An old cartoon from a dusty copy of the Canadian Army's Second World War service rag, *The Maple Leaf*, depicts the industrious Trooper Burp astride a cantankerous carriage which has fused elements of ancient and modern transportation systems. Glaring out of Burp's tank hull are the somewhat insidious faces of the three mules which power the contraption. A diminutive underling explains to the watching senior officer that, "he thinks he's solved tank warfare in the mountains, sir!"¹ Tank warfare in the mountains was indeed a problem for the Allies in Italy, yet the mountainous spine of the peninsula was not an insurmountable obstacle. Through innovation and adaptation, techniques and tactics were reconciled to a host of new transportation technology which sought to overcome the mud and the mountains. At times cutting-edge technology and improvisation in the field could solve the problems encountered in the hard struggle up the Italian peninsula. Technology, however, was not a cure-all, and the use of ancient tools such as the Sicilian mule serves as a corrective to the popular conception of the Second World War as the ultimate example of modern, mechanized warfare.

The study of mechanization² and the Canadian Army in the Italian Campaign has been dominated by a historiography emphasizing misguided national policy, a brutal strategy of attrition, and an inferior doctrine, prosecuted with the wrong equipment.³ This line of reasoning states that the 5th Canadian Armoured Division should never have been sent to the Italian peninsula and that when it arrived, it had to match its pathetic Sherman tanks against powerful German *panzers*. To further denounce Canadian efforts, this historical reasoning emphasizes an inflexible doctrine applied to terrain deemed anything but "tank-country." Instead of Winston Churchill's, "soft underbelly of Europe, the Allied armies are said to have fought a brutal war up the "crocodile's back."⁴ This narrative of pointless failure is in need of adjustment.⁵ Examination of the British and Canadian discourse surrounding mechanization at the highest political and military levels offers an

appreciation of the cultural factors which contributed to an armour-heavy balance of Canadian Army formations. By studying the Canadians' ability to adapt to new technology during the campaign, and the manner in which equipment was integrated into the Army's weapons-system, a flexibility is observed which counters the theme of stubborn, artillery-based pounding that predominates the historiography. The Canadians in Italy were fighting in a period of rapid technological advance, and adjusting everything from strategy down to small-unit tactics to wage war in this changing environment.

In 1939, Canadian national policy reflected the precarious military balance of a divided and ill-prepared country with little enthusiasm for entering another European war.⁶ Public aversion to commitment on the European continent, or at least the Mackenzie King government's perception of public opinion, justified the promise for no conscription for overseas service and kept Canadian military proposals limited to home defence, economic aid, and aerial contributions.⁷ On 6 September 1939, a British telegram to the Canadian government enunciated the hopes for a strong Canadian commitment, but recognized that political realities precluded the announcement of a robust contribution from the Dominion. The telegram read, "while it is hoped that Canada would exert her full national effort as in the last war, even to the extent of the eventual despatch of an expeditionary force, it is realised that no statement of policy on these lines is likely to be possible at the moment."⁸ In light of these considerations, British requests were limited to: a small unit to serve overseas; technical units for attachment to British formations; technical personnel for posting to British units; and naval and air forces. The modern and mechanized form of warfare in the Second World War, and its reliance on a host of technical specialists, would shape British hopes for Canadian Army contributions at the outbreak of the war. By the following summer, the knowledge that such technicians largely would be drawn from tradesmen working in industry brought the conflict between munitions production and the "modern divisional organization" to the fore.⁹ With a robust interpretation of the term "unit", the 1st Canadian Division was sent overseas in late 1939, but it was the end of the "phoney" war that revved up the Canadian Army's war efforts.

On 17 May, with German armoured divisions cutting off Allied forces in the Low Countries, the Minister of National Defence, Norman Rogers, reported that Britain (let alone Canada) was unprepared for mechanized warfare.¹⁰ A historiography heavily influenced by the writings of Sir Basil Liddell Hart would strongly agree, since a host of British interwar "apostles of mobility" were ignored by the military establishment, who failed to procure effect-

ive armoured fighting vehicles or a doctrine to use them.¹¹ The *blitzkrieg* standard of highly mobilized forces with a large proportion of armour seeking to break the enemy's line and wreak havoc on command and communications, became the touchstone against which armoured doctrine was measured thereafter. By the end of 1940, Canada received the British request for the contribution of a complete armoured division, beyond the Army Tank Brigade already called for.¹² On 13 August, General Order No. 250 officially brought the Canadian Armoured Corps into being, less than a year after the government had announced the Canadian Tank Centre was to be mothballed, as the army expected not to use tanks in the current war.¹³ The Canadian public also embraced mechanized solutions to Canada's military unpreparedness. Citizens in Ontario organized a "buy-a-tank" campaign, which raised funds for the purchase of armoured vehicles for the army.¹⁴ British Prime Minister Winston Churchill championed mechanization as an answer to a dearth of manpower. Churchill stated, "we cannot hope to compete with the enemy in numbers of men, and must therefore rely upon an exceptional proportion of armoured fighting vehicles."¹⁵ Canadian Prime Minister Mackenzie King, for fear of casualties and conscription, shared these views, and Canada's army leadership reacted to the fall of France in a similar manner. In Army planning for 1941, the brass felt, "the power of the modern army resides in its arms and equipment - not in the number of men in its ranks."¹⁶ For the Canadian Army, the lessons of the war in 1940 meant, "our forces of the future must be based on mechanized power, which includes artillery, armoured fighting vehicles, and close-support aircraft. Man, on the battlefield, is only needed as eyes and brain for the machine-powered weapons..."¹⁷ In late 1941, while the war raged in the Western Desert, in Ottawa, Churchill made the British hope for a Canadian contribution of a second armoured division clear to Mackenzie King.¹⁸ The ratio of armoured to infantry divisions in the Canadian Army, and the eventual dispatch of an armoured division to Italy, had much to do with these early requests for armoured formations by the British government, as did the discourse of mechanization, which envisioned machines as a panacea for the ills of the liberal democracy at war.

The decision to send any Canadian troops to the Mediterranean theatre was a response to pressure for active service from the Canadian public, military, and Department of National Defence. Historian Bill McAndrew cast this decision as embodying Anglo-American conflict over strategic interests, leading to a misunderstanding over the aims of the campaign.¹⁹ McAndrew's work implies that Canadian national interests were not met in a campaign which was initiated by Churchill's desire for British control in

the Mediterranean, and characterized by British imperial sentiment which classed the dominions as colonial auxiliaries. McAndrew's final verdict was:

The effects on Canada and the Canadian Army of sending the Canadians to the Mediterranean were less than positive. Splitting the army in two foreclosed any possibility of exerting the degree of national control of the country's armed forces that their size warranted. Not quite colonials in Italy, neither were the Canadians full allies. Having no say in policy, they could merely implement the decisions of others. Costs were anything but negligible.²⁰

McAndrew suggests the Canadian government would have done better to resist public pressures to deploy Canadian forces to the Mediterranean. With the benefit of hindsight this argument is logical; yet the contemporary desire for battle experience and the positive influence on Canadian morale of the active engagement of the Canadians in Italy are important factors to consider.

By 1943, the government's opinions towards Mediterranean deployment had changed a great deal. Back in 1940, Cabinet War Committee discussion noted that Canadian public opinion accepted the defence of the United Kingdom, but would be cool to the prospects of sending Canadians to fight in the desert war.²¹ Throughout the next year, however, the Department of National Defence increasingly argued that Canadian public opinion was frustrated by the inactivity of Canadian troops.²² Mackenzie King's initial resistance to these pressures found support from Lieutenant-General Andrew McNaughton, who was initially loath to divide the five divisions of the Canadian Army which gathered in Britain in 1942.²³ It had long been the opinion of Canadian government officials that the Canadian public was favourable to a strictly Canadian formation taking the field, as opposed to Canadian units serving under British command.²⁴ The desire for battle experience, however, led by Minister of National Defence James Ralston and the Chief of the General Staff Lieutenant General Kenneth Stuart, along with growing public pressure (heightened by the lack of Canadian participation in Operation TORCH, the invasion of North-West Africa), led to the dispatch of the 1st Canadian Infantry Division and the 1st Canadian Army Tank Brigade for the invasion of Sicily on 10 July 1943, and the subsequent formation in Italy of the I Canadian Corps with the addition of the 5th Canadian Armoured Division.²⁵ This separation of troops from the Canadian Army would later earn great criticism from historians.²⁶

The decision to send more Canadian troops to the Mediterranean was predicated on the idea that these soldiers would receive operational experience which, upon their return, would help the Canadian Army prepare for its role in the invasion of North-West Europe.²⁷ McNaughton's objection to these premises would accelerate his dismissal from command of the Canadian Army overseas. Historian Douglas Delaney notes that there had been "nettled negotiations" in the decision-making which led to the late 1943 dispatch of the 5th Canadian Armoured Division and I Canadian Corps Headquarters.²⁸ After Allied leaders at the Quebec Conference of August 1943 decided upon expanding operations in the Italian peninsula, the Canadian Cabinet War Committee pressed Churchill for the deployment of a Canadian Corps there.²⁹ In subsequent discussion between McNaughton and the vice-chief of the Imperial General Staff, General Archibald Nye, it was discerned that if any troops were sent at all, they should be infantry, as there was already more armour in the theatre than needed.³⁰ McNaughton's worries that this would leave an infantry-heavy balance in the remainder of Canadian Army in Britain of two armoured divisions, an assault infantry division and an armoured brigade, were dismissed with the suggestion that British infantry divisions would probably be put under command for Operation OVERLORD, the invasion of North-West Europe. Importantly, whether from McNaughton's concerns for a balanced Canadian force in each theatre, or the decision to bring the famed "Desert Rats" of the 7th Armoured Division back from the Mediterranean, a Canadian Armoured Division was sent to Italy. In the fall of 1943, after heavy Canadian pressure was applied by the High Commissioner, External Affairs, the Prime Minister, and the Canadian military to both Churchill and Chief of the Imperial General Staff Sir Alan Brooke, it was ordered that Operation TIMBERWOLF, the dispatch of I Canadian Corps, and the 5th Canadian Armoured Division to the Mediterranean, would commence. Allied Forces Headquarters in North Africa, however, had not been informed of these changes, and upon learning of the decision, General Harold Alexander asserted that he would not need the extra armour in Italy, and that he would prefer an infantry division.³¹ Both Alexander and Eighth Army commander Bernard Montgomery did not want another Corps headquarters or additional armour. For McAndrew, this conflict between, "contradictory national and operational demands were irritants in Italy that would not go away."³²

The discourse of mechanization in the early years of the Second World War can be observed running through all aspects of Canadian society. The concept of mechanized forces, with heavy emphasis on the tank as the war-winning,

mobile, offensive weapon, shaped early Canadian army organization. The Canadian government, military, and public all considered the Second World War a mechanized war, one in which machines could replace men on the battlefield. Due to these pressures and those of the British government, by 1943 the Canadian army had two army-tank brigades, three infantry divisions, and two armoured divisions in Britain. McNaughton's decision to send the specific forces he did to Italy had much to do with his desire to retain a balanced force in each theatre. Despite resistance from the highest level in the Allied command in Italy, a Canadian armoured division would be added to the order of battle. Canadian desire to boost morale, the need for battle experience, and the balance of armour and infantry units should all be considered before dismissing Canada's contribution to the campaign as contrary to national interest.

Terrain was a major reason why Montgomery and Alexander were critical of the arrival of more armour in Italy. Veteran Al Sellers of the Governor General's Horse Guards sums up this vein of criticism, much repeated in the campaign's histories, in his statement that, "Italy was very, very poor tank country."³³ It would be foolhardy to suggest that mountains, mud, and terraced vineyards were not an impediment to mobility on the Italian peninsula, but to dismiss armour as useless in the campaign would be equally oversimplifying the matter. Brigadier W.C. Murphy, Officer Commanding 1 Canadian Armoured Brigade, wrote that to dismiss the Italian peninsula as "not tank country" ignores the complex situation on the ground.³⁴ Murphy noted that the Sherman's climbing ability meant that German defenders could be surprised by the use of armour in terrain supposedly impassable to armour. Reports from 1 Armoured Brigade on operations noted that:

It was formerly generally conceded that t[ank] country was that type of country which offered good going, and contained successive features, permitting good f[ields] of fire from hulldown pos[itions] and [support tank by tank or troop by troop]. It is suggested, however, that in Italy at least this is the very type of country which is now considered most undesirable as far as the t[ank] man is concerned...Such good going is confined to comparatively small stretches of the country, and almost invariably such stretches are covered by carefully sited Panther or Tiger t[anks] or [anti-tank] guns of various types.³⁵

In the fall of 1944, the regiments of 5 Canadian Armoured Brigade were also using the unexpected climbing capacity of the Sherman tank during oper-

ations. A report notes, "the siting of the dug-in Panther turrets in most cases was to cover down draw or re-entrants and they were knocked out at close range by moving along the tops of ridges which enabled [troops] to get very close before being seen."³⁶ Terrain certainly played a role in the division of the all-arms team. Infantry wished to advance under covered terrain, while tanks sought open rolling hills where sub-units could take hull-down positions and cover the moving forces. In June 1944, such terrain was found in the Chiana valley by Murphy's 1 Brigade, but as the brigadier later noted, good tank country also gave good fields of fire for anti-tank guns.³⁷ In close country, the friction between the arms increased. Murphy recalled, "Italy, with its mountains, valleys, olive groves, vineyards, crops, walled cemeteries, and other detestable features (that is, from a tank point of view) further complicated relations between the two arms. After all, the infantry wore cloth jackets, and the tankmen had several inches of steel to protect them, so why should not the tanks fight where the infantry had to go?"³⁸ In response to the rapid increase in anti-tank technology, by 1944, infantry-tank doctrine was prescribing that in close country, infantry would have to lead.³⁹

Terrain, then, was not an unconquerable variable in Italy, but one which innovation and adaptability could overcome. Terrain like the "razor-back" hills in the Liri Valley, on 5th Canadian Armoured Brigade's path towards Pofi was described as "practically impassable for [tanks]."⁴⁰ The brigade advanced on two centre lines in order to find the path of least resistance. The close country emphasized armour's need for close support from the motorized infantry battalion. Strict timings could not be set, so the remainder of the brigade awaited the brigadier's commands. Methods of maintaining direction in such country were difficult, but inventive techniques were employed using artillery air burst shells called in on the centre lines. As each arm adapted to the environment, the weapons-system as a whole became a more efficient machine.

Baptism by fire in the rugged terrain spawned another mechanized innovation: armoured engineers. As the 1 Canadian Armoured Brigade advanced beyond Rome in the summer of 1944, the 1st Canadian Assault Troop was added to the order of battle. This troop provided yeoman support in mine removal, road improvements, in one instance blasting a road across a cliff face.⁴¹ The 5 Canadian Armoured Brigade had good results assigning a number of sappers to armoured regiments who were to travel in M3A1 Stuart tanks, (lighter armoured vehicles designed for high speed known as "Honeys" in Anglo-Canadian service), performing engineering reconnaissance, clearing mines, and creating demolitions and diversion.⁴² For river

crossings, Valentine bridge-laying tanks were allotted to the armoured regiments. The maintenance of roads was difficult, especially as tracked vehicles destroyed them rapidly.⁴³ The British official historian noted that at times the bulldozer was as crucial to the campaign as the tank.⁴⁴ While D4 bulldozer's were allotted to the engineering units, the Royal Canadian Army Service Corps lobbied for a bulldozer for each of their formations.⁴⁵ The Sherman tank was at times modified to meet these demands. In the advance to Coriano, Lieutenant Doug Graham dispatched three Shermans with bulldozer blades to clear crossings over a stream.⁴⁶ When two of these machines broke down, he prepared three diversions himself just in time for the fighting echelon to arrive.

Tactics had to adapt to conditions that were far from ideal. Tanks were considered to be poor for use in built-up areas, but in Italy standard small-unit tactics were adopted for the use of armour in the urban environment. In the battle of Ortona, 'C' Squadron of the Three Rivers Regiment proved its worth in a support role.⁴⁷ Blasting holes in houses with armour-piercing rounds, and following these up with high-explosive rounds was a technique used in the town that would later become standard operating procedure for Sherman operators in Italian villages. These innovations proved no panacea,⁴⁸ but were demonstrative of a new way of thinking, rooted in necessity.

The tank, in and of itself, was not the magical replacement for manpower that politicians had dreamed of at the outbreak of war. All-arms cooperation, with an integrated weapons-system of engineering, artillery, infantry and armoured assets, was the means to military effectiveness on the Second World War battlefield. The history of the Canadian Army in Italy reveals great efforts were made to integrate modern motorized technology into a working system of multiple arms. 1 Canadian Armoured Brigade had long developed standard operating procedures for marrying-up with infantry. Their role as an army-tank brigade, an army asset to be attached to infantry formations when needed, meant that they would necessarily cooperate with a vast array of infantry. Officers of the brigade had produced a document for its cooperating infantry called the "Aide Memoire" for this purpose.⁴⁹ The document described the procedure for netting communications, marrying up sub-units, and liaising with the artillery, infantry and engineers. Despite such procedures, after the hard-fought battle north of Rome, during the breaking of the Trasimene Line, a scathing report on lack of support from the 2nd King's Regiment in the 24 June 1944 advance on Vaiano was released.⁵⁰ The infantry had gone to ground while the armour pushed ahead to its final objective. As night fell, the armour was forced to return to safety,

having shot up numerous German paratroopers, but failing to gain ground. The document refers to the previous 17 May 1944 attack with the Royal 22e Regiment, comparing this “perfect” tank-infantry cooperation, with that of the King’s Regiment. The comparison shows that the vital synergy of the all-arms team could be undermined by the circumstances of war. The King’s heavy casualties earlier in the Liri Valley meant that at the Trasimene Line it was missing vital leadership from experienced non-commissioned officers and subalterns. Lack of previous cooperation with the Three Rivers’ tanks reduced the potential of effective co-operation.⁵¹ Circumstance could play a large role in the successful adaptation of techniques to technology. The combined-arms team as a whole needed to share a working knowledge of tactics, or trust and combat motivation could wither.

The 5th Armoured Division had not had an excellent start to tank-infantry co-operation. In the Arielli affair of January 1944, nearly two hundred casualties were inflicted on the untested 11 Canadian Infantry Brigade. The failure was assessed as a lack of all-arms cooperation.⁵² In February, a circular to all the commanding officers of 5 Canadian Armoured Brigade stressed that infantry confidence had to be improved by instilling the knowledge of what armour could do.⁵³ When the division was concentrated for its training for the DIADEM offensive, it was the planning and execution of cooperative attacks by infantry, armour and artillery that was stressed. Unfortunately, exercises proved that there were still problems with marrying-up, and communication at the company to squadron level. As the lessons learned report of the 5 Canadian Armoured Brigade noted after the battle in the Liri Valley, fostering an understanding between the various commanders of supporting arms and the importance of these feeling, in turn, that they were part of “a large family of all arms” was the critical lesson of the battle.⁵⁴

The 5th Canadian Armoured Division’s role in the breaking of the Gothic Line in autumn 1944 offers several instances of tank-infantry actions which show improvements in cooperation. The attack of the Irish Regiment and the 8th Hussars on Point 120 has been described as “a model of tank-infantry cooperation.”⁵⁵ The armour “shepherded” the infantry onto the objective, and provided accurate direct fire support on arrival. A whole German company was destroyed by the Besa machine-guns of the Hussars, when the enemy attempted to escape to the west. After the Strathcona’s had spent a harrowing night with the Perth Regiment at the bridgehead that the British Columbia Dragoons had sacrificed a great deal to open, the infantry were found to be incapable of pushing on. On 1 September 1944, the Princess Louise’s Dragoon Guards conducted their first all-arms attack in the infantry role, on Monte

Peloso. With 'C' Squadron in direct support, searching the wheat fields with their machine guns, the team advanced with great success. Supporting fire was given from the Strathcona's 'A' Squadron from Point 204 to the south-east, and a large group of paratroopers forming up to attack there was cut down by 'C' Squadron leaving 120 dead German paratroopers on the field of battle.⁵⁶ The after-action report of Major J. Smith reads like a quintessential example of a squadron's support of an infantry battalion. Troops provided covering fire while others were on the move, the lead armoured troop joined the first wave of infantry, and the self-propelled M10 tank-destroyers moved up onto the objective to relieve the tanks to return to their forward rally, ready for a counter-attack. The 5th Canadian Armoured Division proved the value of rehearsing marrying-up and took advantage of the fact that its units could develop a degree of familiarity in training and operations under the same formation.

The relationship between armour and artillery is another important aspect of the all arms team, and one which also had to adapt to new mechanized tools. The study of the Royal Canadian Artillery's role in the Italian campaign shows that technology's true benefit was in its integration into a weapons system, of which the guns played a major role. Mobility became a major concern for artillery regiments. As the 1st Division's artillery commander Brigadier W.S. Ziegler noted after the Hitler Line battle, "at some stage during the advance the principal requirement to enable efficient artillery support changes from 'weight of fire' to 'mobility'".⁵⁷ A major benefit of armour was its role as mobile communications centres. The ability of tank radios quickly to relay targets of opportunity was capitalized upon by allotting Forward Observers to armoured regiments. During the fighting in the Liri Valley, Forward Observers with the armoured squadrons were deemed "absolutely invaluable for bringing down quick fire."⁵⁸

The use of highly mobile wireless sets on the front-lines was also of great value in the connection of ground forces to tactical air power. By late 1943, the "Rover tentacle" was in use, typically posting a White armoured scout car with the leading brigade, with multiple wireless sets which could connect to airfields, army headquarters, and fighter-bomber pilots.⁵⁹ Numerous complaints were lodged that the so-called Cab-Rank, the flight of fighter-bombers which circled directly behind the front-lines waiting for targets of opportunity to be radioed in, was never populated with enough fighter-bombers to approach anything near reliability.⁶⁰ Tactical air support, however, generally improved as the campaign continued, with the major caveat that with the winter of 1944-45 clouding the skies, ground forces were increasingly reliant on conventional artillery support.

The relationship between armoured and anti-tank regiments was also crucial, especially considering that doctrine was designed for the anti-tank gun to be primarily responsible for engaging enemy armour. Getting the towed anti-tank support to its useful position, directly behind the advancing friendly armour, was another source of innovation. Tests of towing couplings in April 1944 were undertaken to determine the possibilities of hauling 17-pounder anti-tank guns by Stuarts (deemed only possible with "grouser" track extenders), and six-pounders by Shermans and M10s.⁶¹ The six-pounder anti-tank gun portee vehicle was found unsatisfactory due to its performance and size.⁶² After poor results in the Liri Valley, the staff of the 5 Canadian Armoured Brigade suggested these be replaced by Universal Carriers. Self-propelled artillery was at times the only fire support available, due to the failure of the tractor borne artillery to advance. Mechanized field howitzers and self-propelled anti-tank guns were developed to allow them to keep pace with rapid advances. The 64th Jeep Battery was one formation created specifically to tow anti-tank guns over rough terrain.⁶³ Their praises were sung by armoured commanders who claimed, "in country where r[oads] are few and comprise mostly tracks, the Jeep Drawn 75mm gun is undoubtedly the answer."⁶⁴ The war diary of the 5th Canadian Armoured Brigade notes that during Lieutenant Edward Perkins' famous action in the Melfa River bridgehead, the only artillery support that he received were 2000 rounds from the jeep-drawn battery acting from across the river.⁶⁵ Calls from I Canadian Corps in the summer of 1944 for more jeeps and M14 Half-Tracks from Allied Armies Italy, were met with refusal due to a lack of vehicles in theatre.⁶⁶

Despite the sensational popularity of tank battles, tank versus tank action was a rarity in the Italian campaign. In Anglo-American armoured doctrine, the anti-tank gun, in its various tractor-towed and self-propelled varieties, was meant to combat enemy armour. As a Canadian doctrinal circular stated, "it must be remembered that tanks are primarily for counter attacking BOSCHE infantry, NOT BOSCHE tanks."⁶⁷ The friction of battle, however, meant that anti-tank guns were not always in position when the *panzers* appeared. In tank versus tank action, the general rule was that the gun to fire first won the day. The Sherman's power traverse gave an advantage in this case over the manual controls of the Panther tank.⁶⁸ Panthers in Italy also suffered from mechanical difficulties, with spare parts difficult to obtain.⁶⁹ However, there are numerous accounts of the Sherman's armour-piercing rounds bouncing off the Panther's sloped armour. Revising the trope of superior *panzerkampfwagen*'s should not be taken too far.

In the battle before the Melfa, two squadrons of the Strathconas came out even in a bloody duel with a Panther company concealed in the Liri Valley foliage.⁷⁰ The high proportion of officers killed in the Strathcona's fifty-three casualties is consistent with ongoing research which suggests that the practice of Sherman tank commanders to fight "unbuttoned", peering out of the top hatch for all-around vision, was a practice with deadly results.⁷¹ When a tank commander completely dismounted, as happened often in the close country beyond the Melfa between Ceprano and Frosinone, his chances of becoming a casualty sky-rocketed.⁷² As the staff of 5 Canadian Armoured Brigade noted, tank commanders "can see very little unless they stick their heads and shoulders high out of the top of a high turret on a high tank. Most conspicuous!"⁷³ Crew commanders were warned to expose themselves as little as possible and keep their shoulders within the tank.⁷⁴ Some experimentation was undertaken in removing one of the hatch covers in order to reduce the effect of, "making a V in the centre of which is the crew com[mander's] head for a sniper's target."⁷⁵ The solution to this lack of vision was for the infantry to act as the eyes for the armour. The subject of target indication in tank-infantry cooperation, was one which elicited much study by British operational researchers.⁷⁶ Officers in the 5 Canadian Armoured Brigade noted "the most difficult signal to arrange is, one to the other, 'Look at me, I am about to make one of our prearranged signals.'"⁷⁷ While a few armoured melees occurred during the campaign, the preferred method of operations was the mutually supporting weapons system of the all-arms team.

Criticism of Canadian doctrine began as early as the writings of official historian C.P. Stacey.⁷⁸ In 1991, John English built on this critical narrative, blaming Canadian high command, in particular, for failing to develop appropriate leadership, training or doctrine in the Canadian Army.⁷⁹ For English, Canada's interwar army was distracted by, "strategic and regimental twin attractions [which] ensured the general neglect of the operational and tactical sphere of war." In this sphere, English argues, the artillery barrage dictated the timing of the attack, robbing junior leaders of initiative on the battlefield. Regimental fealty blinded officers to the need for all-arms training and tank-infantry cooperation was ignored. This standard critique was shared by historian Bill McAndrew in the case of the Canadian Army in Italy.⁸⁰ This interpretation takes a freeze frame of Anglo-Canadian doctrine and applies it to the whole war, ignoring that doctrine was constantly evolving and adapting.

Despite the well-known interwar publications of Canada's own "apostles of mobility", Canadian doctrine was largely derived from British sources, and was constantly changing as the lessons of battle were digested.⁸¹ The

steady evolution of doctrine can be seen in the changes to British instructional manuals regarding the deployment of armour. While early pamphlets prescribed an all-armoured initial wave, later doctrine had accepted a more robust interpretation of tank-infantry cooperation. Infantry were told that they would need to precede the tanks to destroy anti-tank guns, and the second wave adopted a more coordinated drill for fire and movement.⁸² Doctrine for the armoured divisions during the early period remained very tank-centric, as was evidenced by their tank heavy organization of two armoured brigades, and only two infantry battalions (one motorized and the other in the support group). After British experience in North Africa, a restructuring of the Canadian armoured divisions balanced them out with one armoured brigade and one infantry brigade. After the Liri Valley, the 5th Armoured Division added another infantry brigade in order to thicken up the front and allow for the leap-frogging of brigades to maintain momentum.⁸³ As the war progressed, cruiser-tank doctrine for armoured divisions began to approach that of the infantry tanks in the Army-Tank Brigades. By Spring 1944, the 5 Armoured Brigade was emphasizing that infantry must lead in breaking defences in close terrain, dominated by anti-tank guns or blocked by obstacles.⁸⁴ Doctrinal circulations stressed that the goal of the tank-infantry attack was lodging the infantry securely on the final objective. This gradual amalgamation of cruiser and infantry-tank doctrine was a function of their increasingly overlapping tasks. This is evidenced by the use of 5th Canadian Armoured Brigade in the break-in battle for the Gothic Line. McAndrew derisively commented of this battle that, "tankers in armoured divisions usually broke out of prepared defences, not into them."⁸⁵

In the attack on the Gothic Line, there was no shortage of initiative, and certainly no signs of a ponderous over-planned artillery based Anglo-Canadian doctrine. Great initiative is clear in both Bert Hoffmeister's decision to bounce the line two days before the operation was supposed to commence, and in British Columbia Dragoon's commanding officer, Freddy Vokes', decision to press on toward Point 204 when a firefight erupted on the assembly area where his infantry support did not arrive.⁸⁶ The mountainous terrain did not hinder the subsequent attack by the Strathcona's, which were moving up to support the aggressive break-in battle of the British Columbia Dragoon's. The Strathcona squadrons conducted text-book fire and movement, with squadrons adopting firing positions for the attack on Pt. 322.⁸⁷ A curious instance of the use of mechanization occurred when the enemy used farm tractors to distract and confuse the Strathcona's and infantry from the Perth regiment, while counterattacking during the night.

Critiques of Allied mechanized equipment dwell all too often on technical comparisons between the opposing force's main battle tanks. Far more important to military effectiveness were the integration of technology into the existing weapons system, along with the alteration of the ways that system was deployed. This adaptation of techniques to new equipment had begun before the Canadians were even sent to the Mediterranean. A great deal of new kit arrived to streamline the Canadians with the British war establishment in theatre.⁸⁸ The 1st Canadian Army Tank Brigade had been equipped with Sherman's with Chrysler engines in the spring of 1943 while training in Scotland, in order to coordinate supply with British organization.⁸⁹ The transition to new equipment was nothing new to the troopers, who had adjusted to four different tank models in as many years.

When it came to equipment, the Fifth Canadian Armoured Division did not make an auspicious start on the Italian peninsula. As part of the negotiations that led to the forming of the I Canadian Corps, it was agreed to take over equipment from British units that were leaving the Mediterranean theatre.⁹⁰ Unfortunately, attrition in the North African campaign and unofficial trading of vehicles from 7th Armoured Division's stores to other units of the Eighth Army meant that, when 5th Canadian Armoured Division took over the equipment, there were no tools, and there was a severe lack of spares.⁹¹ The lack of four wheel drive vehicles was another major drawback of the old kit.⁹² In the summer of 1944, after the breaking of the Gustav and Hitler lines, and steady use for over a year, the Royal Canadian Army Service Corps reports noted that "many elderly veh[icles] are now at the end of their useful life."⁹³

The Sherman tank has been central to equipment-based criticism of Allied armour. While the tank certainly had its limitations, there were also positive aspects of the armoured fighting vehicle's design, which were capitalized on in the Italian terrain. One was the previously mentioned, "unexpected mobility...in mountain warfare."⁹⁴ Shermans could, at times, best the larger German Panther tanks, as in the first recorded "kill" on the approach to the Melfa.⁹⁵ One possible advantage the Sherman had over the Panther was its quick turret traverse. While Panther gunners had to hand-crank their turrets, the Shermans were equipped with a hydraulic traverse system. In the spring of 1944, some innovations appear to have been considered as further improvements for Sherman turret crews, as staff of the 5 Canadian Armoured Brigade set to "inventing turret quickeners."⁹⁶ Great innovation and modification was present on the ground during the campaign. In the 5th Canadian Armoured Brigade, Brigadier Desmond Smith

personally examined a Sherman to determine the modifications necessary to convert the vehicle into a command tank.⁹⁷ Far more important than a strict comparison of muzzle velocity, armour thickness, and horsepower, was the integration of armour into the weapons-system as a whole. Anglo-Canadian doctrine hoped to destroy enemy armour with the anti-tank gun, and avoid the much sensationalized tank duel.

Tracing the history of the Stuart tank during the campaign uncovers adaptation, innovation, and an evolution of techniques in response to equipment. The M3A4 Light Tank, known as the "Honey" in British service, underwent great modification during the Italian campaign. The Stuart was used by armoured regiments in their reconnaissance troops, with their turrets removed for greater visibility.⁹⁸ The use of reconnaissance troops in general was another technique which evolved throughout the campaign. During the battles before the Hitler Line, the 1 Canadian Armoured Brigade noted that its regiments used the Stuart tanks largely to bring up supplies to the fighting echelons. After the breaking of the Trasimene Line in June 1944, these reconnaissance forces were being used aggressively to seize bridges before enemy engineers could demolish them. Later in the campaign, during the breaking of the Gothic Line, the Lord Strathcona's Horse reported its reconnaissance troop, "ferreting large numbers of paratroopers out of dugouts and fire pos[itions] from which they had done much sniping."⁹⁹ The reconnaissance regiments allotted to each armoured division were deemed to require tanks for effectiveness against enemy rearguards that included armoured fighting vehicles. Eighth Army reported that Staghound armoured cars could not compete off-road with armoured vehicles and that, during advances in the Liri Valley, the reconnaissance units had failed to maintain contact.¹⁰⁰

The Italian Campaign was certainly competing with north-west Europe for equipment, as is witnessed by the failure of Sherman Fireflies (with the standard 75mm gun increased to the more formidable 17-pounder) and track grousers (add-on extensions providing more surface area), to arrive in the theatre until late 1944.¹⁰¹ In the mid-October attack over the Scolo Rigosso on the village of Bulgaria, the Strathcona's reported success with the first use of their 17-pounder Sherman 1C.¹⁰² The new technology, as usual, had demanded new techniques, and the lessons learned of the engagement recommended keeping the 17-pounders in reserve as the long gun was difficult to camouflage and the enemy inevitably picked it as his first target. I Canadian Corps Intelligence had long known that the enemy had selectively targeted command tanks, known by their special markings or the manner they were used in action.¹⁰³

To fully understand the challenges of motorized warfare, Second World War historiography's fascination with the tank must be tempered with a consideration of other forms of mobility. With the vast numbers of road-bound vehicles involved in mechanized warfare, it is no surprise that movement control problems stifled the advance. Major problems arose for the Eighth British Army in the Liri Valley, where staff officers noted "traffic was by far the greatest single cause of delay."¹⁰⁴ Delaney also addresses Eighth Army's failings in the Liri Valley in respect to the allotment of routes and use of space. Delaney notes, "stuffing two corps into a corridor with only enough routes to service one corps properly was unwise."¹⁰⁵ He largely blames Eighth Army commander Lieutenant General Oliver Leese for attempting to fit the 6th British and 5th Canadian Armoured Divisions down the same main route during the pursuit up the Liri Valley.¹⁰⁶ In the initial move to assembly areas for the exploitation of the breach in the Hitler Line, returning traffic from 25 British Armoured Brigade further delayed the start-time.¹⁰⁷ After the Liri Valley traffic problems the Canadian Corps formed a Traffic Control Office for determining road layout, selecting one-way routes, establishing a vehicle movement system, and monitoring roads for overuse.¹⁰⁸

As Churchill once said, "victory is the beautiful, bright coloured flower. Transport is the stem without which it could never have blossomed."¹⁰⁹ Logistic impediments began for the Canadians before they even hit the beaches of Sicily, when the ship carrying much of their transport trucks was torpedoed in the Mediterranean. Only 114 of 500 trucks lost had been replaced by the end of the Sicilian campaign.¹¹⁰ Such problems heightened the Royal Canadian Army Service Corps' challenge to maximize use of existing transport. On the move northward in Calabria, a system of continuous running was established which kept vehicles on the road twenty-two hours a day by assigning maintenance crews and relief drivers to keep them moving.¹¹¹ Supply is an ancient military problem, compounded by the additional vehicular needs of petrol, oil and lubricants. While armour could travel cross-country, the road-bound gas trucks had to fight traffic on the road. Tanker trucks were not always available, and at times supply of petrol was provided by trucks full of gasoline cans.¹¹² On the operational scale, the storage and transport of petrol was a significant undertaking. Mobile petrol filling centres and petrol depots were supplied by bulk petrol transport companies and pipelines were used for strategic movement of liquids.¹¹³ A Canadian innovation helped those at the mobile filling centre dispense gasoline at the enormous rates necessary. The ASP Multiple Jerrican Filler was an adaptor which could fill eight cans at once.¹¹⁴ The supply of parts

was another problem of mechanization which could be crippling. During the rapid advance in Calabria, Norton motorcycles and jeeps were frequently being put out of action for lack of tires and spare parts.¹¹⁵ The Royal Canadian Army Service Corps reported a dearth of spare parts for motor transport well into the fall of 1944, which had left 3-ton lorries out of service due to a short supply of batteries.¹¹⁶ An idea of the scale of strategic logistic difficulties is provided by McAndrew in enumerating the I Canadian Corps' move to the Adriatic sector in August 1944. The move involved 11,000 wheeled vehicles, 280 carriers, 650 tanks, one million shells and 50 million litres of fuel.¹¹⁷

The jeep was found to be especially useful for small-scale supply to the fighting echelons in rough terrain. The I Canadian Corps Jeep Platoon was an *ad hoc* unit formed for use in the Hitler Line battle to take advantage of the vehicle's rugged mobility.¹¹⁸ With thirty jeeps and forty-five personnel, the units were parcelled out in sections to brigades, and attached directly to battalion and company headquarters. The jeeps could travel off-road, climb hills, cross fords, craters and low classification bridges and carry over a ton. They supported the infantry by hauling anti-tank guns, ammunition, hot rations and evacuating casualties. The infantry carrier, or Bren-gun carrier, was deemed too noisy at times for these tasks, and despite their small numbers, it appears the jeeps were highly useful in the Italian terrain. The platoon was thrown together from personnel in the Service Corps when needed, and performed well in both the Gothic Line battle and fighting in late November 1944. The jeep was commonly used by officers who had to keep in physical contact with multiple units and was featured widely across the Canadian order of battle.

Decidedly ancient methods were at times the solution to logistic problems over Italy's rugged terrain, countering the thesis of adaptation to mechanization as the critical factor in the campaign. The men of the 1st Canadian Infantry Division first learned of this when one hundred mule saddles arrived when training for mountain warfare in Inveraray, Scotland.¹¹⁹ An intelligence report warned the Canadian muleteers that the "Sicilian mule was thinner and longer in the back than the Argentine breed which we know. They are of slight build, very long in the leg, muscular, surefooted and hard-working...Owing to the cruelty and overloading that the mules suffer, they are vicious and resistance."¹²⁰ On 1 August 1944, the 1 Canadian Divisional Mule Transporter Company under Captain L. Jackson was formed.¹²¹ Local Sicilians, not wanting their mules to be requisitioned, put rocks inside their leg bandages to make them appear lame.¹²² Such tactics did not prevent Jackson's officers from obtaining 90 mules for each of the 1st Division's brig-

ades. That the Allies were too fixated on mechanized means of transport is expressed in the post-war comments by the commander of the French Expeditionary Corps, Marshal Juin who believed that the Anglo-Americans were "overly dependent on their vehicles. In Italy wheels didn't necessarily mean mobility."¹²³ Especially in the wet winter months, movement for wheeled vehicles was difficult, even on the roads. For a period in the winter of 1943-44, when the 1 Canadian Armoured Brigade was concentrated for the first time, two of its regiments were supplied strictly by mule.¹²⁴ Mules in the Italian campaign, while only providing a small portion of the Allies' logistic capacity, remind the historian that mechanized technology could not solve all the problems of the war.

The historical debate surrounding the strategy of the Italian Campaign, Canadian participation in it, and military effectiveness of the Anglo-Canadian forces will continue into the twenty-first-century. Adaptation to mechanization is central to these important facets of the Second World War, and proves a corrective to several critical strains in the scholarship. At the highest level of Canadian leadership, discourse surrounding mechanization as an alternative to manpower shaped the organizational balance of the Canadian Army, and elicited a favourable response to British requests for armoured formations. Once in theatre, these formations encountered real-world obstacles to ideals of highly-mobile, armour-heavy forces. Far from useless additions to what would become the Allied Armies Italy, Canadian forces adapted their techniques to terrain incorrectly dubbed "not tank-country". A constant evolution is apparent in doctrine and tactics, and equipment innovations continued throughout the campaign. Canadians adapted to the conditions that they faced, proving that technology is seldom of great import in and of itself. The crucial process for military effectiveness was the steady evolution in organization and techniques which sought to integrate new vehicles into the greater weapons system. The story of mechanization in the Italian campaign also is not a simple story of steady progress. Periods of high casualties could do much to decrease corporate knowledge. Barriers to mobility, especially in the wet Italian winters, could stifle the advance. Far from being a purely modern mechanical success story, at times that ancient logistic tool, the Sicilian mule, was the best means available to get supplies to troops over rugged terrain. Through the study of the Canadian Army and mechanization in the Italian campaign, a balanced and nuanced conception of the Dominion's contribution is afforded which extends beyond a rebuttal to the historical criticism, but also offers an perspective of the military response to technology from tank-crew to the Cabinet War Committee.

Notes

- 1 *The Maple Leaf*, 21 March 1944.
- 2 The use of the term “mechanization” in its broadest signification includes the use of machines which in the military context could include anything from the machine gun to the jet fighter. While the term “motorization” may be a closer match to what is discussed herein, this term has connotations which tend towards the automobile and are hence too narrow for use here. Likewise “armoured warfare” puts the focus on the tank itself, narrowing the focus too far in another direction. For the purpose of this chapter, “mechanization” will refer to the military tools of ground mobility granted by the advent of the internal combustion engine in its many applications.
- 3 In the major survey study of the Canadian Army, the campaign is described as “long, wearing and costly [...] a backwater[...] forgotten, ill-supplied, and all but scorned.” Granatstein notes that, “splitting the army meant that Canada could not exercise true control over its forces.” Jack Granatstein, *Canada’s Army: Waging War and Keeping the Peace* (Toronto: University of Toronto Press, 2002), 218, 285. Themes in the work of historian Bill McAndrew emphasize the dispersal of the national effort, and an inflexible, over-centralized doctrine. Bill McAndrew, *Canadians and the Italian Campaign: 1943-1945* (Montréal: Art Global, 1996); McAndrew, “Eighth Army at the Gothic Line: The Dog-Fight”, *RUSI Journal* 131: 2 (1986), 55-62; “Fire or Movement? Canadian Tactical Doctrine, Sicily -1943,” *Military Affairs* 51, no. 3 (July 1987): 140-145.
- 4 Bill McAndrew, *Canadians and the Italian Campaign: 1943-1945* (Montréal: Art Global, 1996), 70.
- 5 A small band of Canadian academics have started to do so: Lee Windsor, “Anatomy of Victory: 1st Canadian Corps, Allied Containment Strategy and The Battle for the Gothic Line” (Ph.D. diss., Fredericton: University of New Brunswick, 2006). Lee Windsor, “Quansem Ilep, I Canadian Corps Breaks the Gothic Line: Summer 1944” (M.A. Thesis, Waterloo: University of Laurier, 1996). Keith Donaldson, “Thunder in the Mountains: 1st Canadian Armoured Brigade in Italy, 1943-1944” (M.A. Thesis, Calgary: University of Calgary, 2008). Charles Eddy, “Before they were the D-Day Dodgers: 1st Canadian Infantry Division and Operation CHESTERFIELD” (M.A. Thesis, Fredericton: University of New Brunswick, 2009). William Pratt, “1 Canadian Armoured Brigade and the Battle of Lake Trasimene, 20-28 June 1944” (M.A. Thesis, Fredericton: University of New Brunswick, 2010).
- 6 Granatstein, *Canada’s Army*, 176. A “Chiefs of Staff Committee Memorandum” noted on the outbreak of war, Canada was “completely deficient in such essential items as armoured vehicles of all description, anti-tank guns and the anti-aircraft guns and equipment needed for the force.” Cabinet War Committee, “Memoranda of Defence Council and Emergency Council,” RG2, 7-C, Vol. 1. Reel C-11789., Library and Archives Canada, 5 September 1939. Recent scholarship suggests that Canadians were less repulsed by the experience of the slaughter of the Great War than has conventionally been portrayed. For the interpretation of an inter-war Canadian culture which accepted the Great War as just see, Jonathan Vance, *Death so Noble* (Vancouver: UBC Press, 1997). The fact that the King government’s resistance to sending any troops overseas seems to support Vance’s conclusions. Jack Granatstein, *The Generals: The Canadian Army’s Senior Commanders in the Second World War* (Calgary: University of Calgary Press, 2005), 61. For the theory that the Great War had the effect of greater world-wide cultural brutalization see, George L. Mosse, *Fallen Soldiers:*

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- Reshaping the Memory of the World Wars* (New York: Oxford University Press, 1990). Robert Engen, *Canadians Under Fire: Infantry Effectiveness in the Second World War* (Montreal: McGill-Queen's University Press, 2009), 50-60.
- 7 On the "studied moderation" of early-war Canadian defence policy see, C.P. Stacey, *Arms, Men and Governments: The War Policies of Canada 1939-1945* (Ottawa: Queen's Printer, 1970), 9-10, 16. Cabinet War Committee, "Memoranda of Defence Council and Emergency Council," 5 September 1939.
 - 8 "Telegram From the British Government on War Measures, 6 Sep 1939" Appendix C. Stacey, *Arms Men and Governments*, 537-38.
 - 9 Minister of National Defence, James Ralston noted that some 200 separate trades were represented in the modern division. Cabinet War Committee, "Minutes of the Cabinet War Committee," RG2, 7-C, Vol. 1. Reel C-11789, Library and Archives Canada, 4 July 1940.
 - 10 *Ibid.*, 17 May 1940. Stacey, *Arms Men and Governments*, 32.
 - 11 Michael Carver, *The Apostles of Mobility: The Theory and Practice of Armoured Warfare* (London: Wiedenfeld and Nicolson, 1979). For a critical approach on Hart's claims, suggesting that his indirect approach was an alternative to blitzkrieg strategy see, John Mearsheimer, *Liddell Hart and the Weight of History* (Ithaca: Cornell University Press, 1988), 5-6. For a recent rehabilitation of Hart's influence on Panzer doctrine see, Azar Gat, *British Armour Theory and the Rise of the Panzer Arm : Revising the Revisionists* (New York: St. Martin's Press in association with St. Antony's College Oxford, 2000).
 - 12 Stacey, *Arms Men and Governments*, 44.
 - 13 "General Order Number 250 Dated 4 November 1940: Organization - The Canadian Armoured Corps," *Royal Canadian Armoured Corps Review*, no. 3 (July 1967): 31; The Fall of France was also to cancel the conversion of the Three Rivers and Ontario regiments to infantry, ordered in early 1940. John Marteinson and Michael McNorgan, *The Royal Canadian Armoured Corps: An Illustrated History* (Toronto: Royal Canadian Armoured Corps Association in cooperation with the Canadian War Museum, 2000), 83.
 - 14 "Ontario Rallies on Home Front", *Leader-Post*, 5 June 1940.
 - 15 Stacey, *Arms, Men and Governments*, 38. Andrew McNaughton's scientific approach to warfare made King enthusiastic to his posting as General Officer Commanding the 1st Canadian Division in 1939. Granatstein, *The Generals*, 61.
 - 16 The document stressed the need to expand facilities for technical training and recommended equipping more armoured formations instead of infantry. "Canadian Army Programme for 1941", Cabinet War Committee, "Minutes of the Cabinet War Committee," 24 September 1941.
 - 17 "Memorandum for the Minister of National Defence - The Canadian Army" *Ibid.*, 24 September 1940.
 - 18 Stacey, *Arms, Men and Governments*, 45.
 - 19 McAndrew, *Canadians and the Italian Campaign*, 15.
 - 20 *Ibid.*, 156.
 - 21 It is notable that none of the Chiefs of Staff were present at this meeting. C.G. Power argued shortly thereafter that the morale of the army was suffering due to lack of active service. Stacey, *Arms, Men and Governments*, 40. Prime Minister King noted, "The Canadian Public would not be inclined to accept with enthusiasm the sending of Canadian soldiers to new and distant scenes of operations." Cabinet War Committee, "Minutes of the Cabinet War Committee," 1 October 1940.
 - 22 The Department of External Affairs would also argue by 1943 that Cana-

- da's place in the aftermath of the war would be negatively affective if its force remained inactive. Stacey, *Arms, Men and Governments*, 41-42. Ralston argued that recruiting of war personnel in Canada was hampered by the inactivity of the army. Cabinet War Committee, "Minutes of the Cabinet War Committee", 20 May 1941.
- 23 By the end of 1942, the 4th Armoured Division had arrived in Britain making a grand total of 176, 986 Canadian troops overseas. The 2nd Army Tank Brigade would arrive in the following year. C.P. Stacey, *Six Years of War: The Army in Canada, Britain and the Pacific* (Ottawa: Queen's Printer, 1955), 191.
- 24 Minister of External affairs, O.D. Skelton noted the benefit of fostering, "national pride and interest in a distinctively Canadian organization". Prime Minister King argued that the benefits of "the formation of a distinctively Canadian Corps" on the "morale of the troops and upon the people of Canada." Cabinet War Committee, "Minutes of the Cabinet War Committee," 4 April 1940, 17 May 1940.
- 25 C.P. Stacey, *Arms, Men and Governments: The War Polices of Canada, 1939-1945* (Ottawa: Queen's Printer, 1970), 43; Stacey, "Canadian Military Headquarters Report No. 182: The Strategic Role of First Canadian Army, 1942-1944," 47, 61. The Minister of National Defence for Air, Chubby Power argued to send a brigade to Egypt in 1941 to "make some appeal to the public imagination." Cabinet War Committee, "Minutes of the Cabinet War Committee," 20 May 1941.
- 26 The subsequent request by the government for the return of the I Canadian Corps, before it had even seen action was described by Colonel Stacey as "a silly chapter in Canadian war policy." Stacey, *Arms, Men and Governments*, 54. Dancocks describes the I Canadian Corps as "orphaned by their government" in a "lonely war in distant Italy." Daniel Dancocks, *The D-Day Dodgers: The Canadians in Italy, 1943-1945* (Toronto: McClelland and Stewart, 1991), 438.
- 27 McAndrew, *Canadians and the Italian Campaign*, 88. Gerald Nicholson, *The Canadians in Italy*, (Ottawa: Queen's Printer), 341.
- 28 Douglas E. Delaney, *The Soldiers' General: Bert Hoffmeister at War* (Vancouver: University of British Columbia Press, 2005), 121.
- 29 Stacey, "Canadian Military Headquarters Report No. 182: The Strategic Role of First Canadian Army, 1942-1944," 82-83.
- 30 Chief of the Imperial General Staff Alan Brooke also favoured sending an armoured formation. Nicholson, *The Canadians in Italy*, 342.
- 31 Nicholson, 344.
- 32 McAndrew, *Canadians and the Italian Campaign*, 89.
- 33 Lance Goddard, *Hell and High Water: Canada and the Italian Campaign* (Toronto: Dundurn Group, 2007), 85.
- 34 W.C. Murphy, "What is Tank Country," *Canadian Military History* 7, no. 4: 69-70.
- 35 "Operations In Italy - What is Tank Country? - Weekly Summary No. 25" Canadian Military Headquarters, "Canadian Military Headquarters Reports - Operations and Administration - 1st Canadian Corps," RG24, C-2, Vol. 12,306. Reel T-17907, Library and Archives Canada, October 1944.
- 36 "Comments Reviewed from Comd 5 Cdn Armd Bde - Weekly Summary No. 27" *Ibid.*, 10 November 1944.
- 37 The Three Rivers Regiment after breaking the Trasimene Line through "good tank country" had thirteen tanks listed "killed" and irreparable. 60th Light Aid Detachment War Diary, June 1944.
- 38 Murphy, "What is Tank Country," 69.

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- 39 "Military Training Pamphlet No. 63: The Co-operation of Tanks With Infantry Divisions" (May 1944).
- 40 "The Capture of Pofi"; "5 Canadian Armoured Brigade Headquarters War Diary," April 1943, Library and Archives Canada, 4 June 1944.
- 41 Marteinson, 204.
- 42 "The Crossing of the Melfa and the Securing of a Bridgehead by 5 Cdn Armd Bde Gp - Lessons Learned"; "5 Canadian Armoured Brigade Headquarters War Diary," 5 June 1944.
- 43 During the 26 August 1944 advance beyond the Metauro river, in closing with the Gothic Line, sappers had to cut a separate road for the tanks alongside a dirt track which carried the rest of the Corps traffic. McAndrew, *Canadians and the Italian Campaign*, 118.
- 44 W.G.F. Jackson, *Victory in the Mediterranean, Volume VI: Victory in the Mediterranean, Part 2*, (London: H.M.S.O., 1987), 13.
- 45 "1 CDN CORPS TPS RCASC in Sicily and Italy" M. V. McQueen, *Logistics at War* (Hamilton, Ont: M.V. McQueen, 1978).
- 46 *Ibid.*, 128.
- 47 Crowder and Bingham, "The Soldiers of Three Rivers: 12e Regiment Blinde du Canada," 27.
- 48 The attempts of the Irish Regiment and the 8th Hussars to take the town of Coriano demonstrated that the difficulties facing armour operating in cramped conditions could prevail despite previous tactical lessons. On 13 September 1944, the Irish Regiment fought hard to take the town, and after street-by-street fighting, much like that in Ortona, the enemy was thought to have evacuated the village and two troops of Hussars were called up in support. German Panthers and infantry armed with the hand-held anti-tank grenade launcher, the *Faustpatrone*, quickly proved that the town was occupied. After losing a number of Shermans, the Hussars were withdrawn to let the infantry clear the village. Marteinson, 218.
- 49 1 Canadian Armoured Brigade War Diary, "Weekly Report on Operations 3 Apr- 9 Apr", April 1944, Library and Archives Canada, RG24, C-3 , Vol. 14041, Reel T-10647. 11th Canadian Armoured Regiment War Diary, RG24, C-3, Vol. 14238, Reel T-12703, 10 April 1944.
- 50 "Report of Historical Officer on Operation of 12 Cdn Armd Regt (Three Riv R.) Dring June 1944 - Weekly Summary No. 11", Canadian Military Headquarters, "Canadian Military Headquarters Reports - Operations and Administration - 1st Canadian Corps," 21 June 1944. "Notes on the Battle of the Lake Trasimeno Line (1944)." Ace Beach Fonds. McPherson Library Special Collections, University of Victoria.
- 51 Question remains as to whether the common Quebec cultural identity of the Three Rivers Regiment and the Royal 22e Regiment strengthened their, cooperation, morale and drive during the advance on the Hitler Line.
- 52 Marteinson, 125-128.
- 53 "Infantry-cum-Tank Battle" 5th Canadian Armoured Brigade Headquarters War Diaries February 1944.
- 54 "The Crossing of the Melfa and the Securing of a Bridgehead by 5 Canadian Armoured Brigade Group - Lessons Learned" *Ibid.*, 4 June 1944.
- 55 Marteinson, 209.
- 56 Marteinson, *The Royal Canadian Armoured Corps : An Illustrated History*, 211; The Strathcona's commanding officer, Lt.Col. McAvity, was later to note that, "the dead Germans were too numerous to count." "Account of Operations 31 Aug 44 - 1 Sep 44" 5th Canadian Armoured Brigade Headquarters War Diaries, September 1944, Appendix 7.

- 57 "Lessons Learned" "Report of Brigadier W.S. Ziegler, C.R.A., 1 Cdn Inf Div on the Liri Valley Battle." "Notes on Activities, 1 Cdn Corps", Canadian Military Headquarters, "Canadian Military Headquarters Reports - Operations and Administration - 1st Canadian Corps," 29 June 1944.
- 58 "Lessons Learned in the Gusta[v] and Hitler Operations. A Selection of Remarks by Sqn Comds of the 12 C.A.R. - Notes on Activities, 1 Cdn Corps", Ibid., 14 September 1944.
- 59 "The ROVER Tentacle" I Canadian Corps General Staff War Diary, RG24, C-17, Vol. 13,686. Reel T-7112., Library and Archives Canada, February, 1944.
- 60 "The Crossing of the Melfa and the Securing of a Bridgehead by 5 CDN ARMD BDE GP - Lessons Learned", "5 Canadian Armoured Brigade Headquarters War Diary," 5 June 1944.
- 61 5th Canadian Armoured Brigade Headquarters War Diary. 14 March 1944.
- 62 "The Crossing of the Melfa and the Securing of a Bridgehead by 5 Cdn Armd Bde Gp - Lessons Learned""5 Canadian Armoured Brigade Headquarters War Diary," 5 June 1944.
- 63 The Jeep Battery was allocated to the 8th Hussars Task Force in the exploitation beyond the Hitler Line. "The Crossing of the Melfa and the Securing of a Bridgehead by 5 CDN ARMD BDE GP." 5th Canadian Armoured Brigade Headquarters War Diaries. 4 June 1944.
- 64 Ibid.
- 65 Ibid., 24 May 1944.
- 66 "Weekly Summary 1 Cdn Corps", Canadian Military Headquarters, "Canadian Military Headquarters Reports - Operations and Administration - 1st Canadian Corps" 29 June 1944.
- 67 "Infantry-cum-Tank Battle" Ibid.
- 68 Marteinson, 193.
- 69 Prisoners indicating by mid-1944 that many Panther defects had been corrected, but that reduction drives to driving sprockets were still weak." Weekly Summary for GOC-IN-C" Canadian Military Headquarters, "Canadian Military Headquarters Reports - Operations and Administration - 1st Canadian Corps," 23rd June 1944.
- 70 The tally against the Germans were losses of: seven Panthers; four Mark IVs; nine self-propelled guns; five anti-tank guns; five nebelwerfers; four anti-aircraft guns and twenty-one wheeled vehicles. The Strathcona's lost sixteen Shermans. Marteinson, 194.
- 71 Terry Copp, "Some Reflections on the Italian Campaign" (Plenary presented at the 21st Military History Colloquium, Wilfrid Laurier University, Waterloo, April 30, 2010).
- 72 "Advance to Pofi," 5 Canadian Armoured Brigade Headquarters War Diary. 4 June 1944.
- 73 "Infantry-cum-Tank Battle," 5th Canadian Armoured Brigade Headquarters War Diary. February 1944.
- 74 Brigadier's Conference at Brigade Headquarters Ibid. 9 April 1944.
- 75 Ibid. 20 April 1944.
- 76 Yellow tracer from the Bren gun was deemed the best method of target indication where oral communication was impossible. Directorate of Tactical Intelligence, ""The Indication of Targets By Infantry to Tanks." Army Operational Research Group Memorandum No. 134.," November 18, 1944, Armour - Co-operation with Other Arms. War Office 232/38., British National Archives.
- 77 "Infantry-cum-Tank Battle," 5th Canadian Armoured Brigade Headquarters War Diaries. February 1944.
- 78 The narrative which denigrates Canadian military effectiveness is traced to the earlier works of Liddell Hart and

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- Chester Wilmot who wrote that the superior generalship of Montgomery explained allied success against superior soldiers. Terry Copp, *Fields of Fire: The Canadians in Normandy* (Toronto: University of Toronto Press, 2003), 5-6. John Ellis is most explicit in claiming quantitative superiority alone resulted in the Allies finally overcoming the qualitatively superior Wehrmacht. John Ellis, *Brute Force: Allied Strategy and Tactics in the Second World War* (New York: Viking, 1990).
- 79 John A. English, *The Canadian Army and the Normandy Campaign: A Study of Failure in High Command* (New York: Praeger, 1991), 56, 117, 312.
- 80 Bill McAndrew, "Fire or Movement? Canadian Tactical Doctrine, Sicily -1943.," *Military Affairs* 51, no. 3 (July 1987): 140-145. McAndrew, *Canadians and the Italian Campaign*, 54-55.
- 81 Lieutenant-Colonel E.L.M. Burns and Captain Guy Simonds debated the role of armour and its proper organization in the 1938-39 issues of the *Canadian Defence Journal*. Lt. Col. Burns, "A Division that can Attack", *Canadian Defence Quarterly* (3 April 1938) 282-298; Captain GG Simonds. "An Army that can Attack- A Division that can Defend" *CDQ*. (4 July 1938), 413-417; Burns, "Where do the Tanks Belong?" *CDQ* (1 October 1938), 28-31; and Captain G.G. Simonds, "What Price Assault without Support?" in *CDQ* (2 January 1939), 142-147.
- 82 David Allan Wilson, "The Development of Tank-Infantry Co-Operation Doctrine In The Canadian Army for the Normandy Campaign of 1944", Masters Thesis, University of New Brunswick, 1992, 88.
- 83 McAndrew, *Canadians and the Italian Campaign*, 114.
- 84 "Infantry-cum-Tank Battle" 5th Canadian Armoured Brigade Headquarters War Diaries. February 1944.
- 85 McAndrew, *Canadians and the Italian Campaign*, 121.
- 86 *Ibid.*, 206-208.
- 87 J.M. McAvity, "Account of Operations 31 Aug 44 - 1 Sep 44", 5th Canadian Armoured Brigade Headquarters War Diaries September 1944, Appendix 7.
- 88 New equipment included the Thompson sub-machine-guns, 17 and 6 pounder anti-tank guns, new 4.2" mortars, Oerlikon 20mm anti-aircraft guns, and the PIAT anti-tank "bazooka". McAndrew, *Canadians and the Italian Campaign*, 28.
- 89 Stacey, "Canadian Military Headquarters Report No. 182: The Strategic Role of First Canadian Army, 1942-1944," 67.
- 90 The Canadians had stipulated that these tanks should be equipped with the 75mm gun. Stacey, "Canadian Military Headquarters Report No. 182: The Strategic Role of First Canadian Army, 1942-1944."
- 91 "Vehicle Replacements - 5 Cdn Armd Div RCASC" McQueen, *Logistics at War*, 26 July 1944. Arnold Warren, *Wait for the Waggon: The Story of the Royal Canadian Army Service Corps* (McClelland & Stewart, 1961), 246.
- 92 *Ibid.*, 247.
- 93 "Vehicle Replacements" McQueen, *Logistics at War*, 26 July 1944.
- 94 Crowder and Bingham, "The Soldiers of Three Rivers: 12e Regiment Blinde du Canada," 25.
- 95 Lieutenant Nigel Taylor of the British Columbia Dragoons reported that his Sherman gunner Trooper Cecil D. Shears got the best of a Panther on the 24 May 1944 approach to Mancini. Marteinson, 189.
- 96 While the two liaison officers claimed their efforts, "guarantee[d] to quicken any [tank] crew", the nature of their improvements are unknown. In April, quickeners were practised as course work. "Brigadier's Conference at Brigade Headquarters" 9 April 1944. 5th Canadian Armoured Brigade Headquarters War Diaries. 8 March 1944.

- 97 The decision to remove the gun from the command tank was one taken by most commanders at the regiment level and above. Ibid. 9-10 April 1944.
- 98 In March 1944, workshops at Bisceglie were issuing modified Stuarts at a rate of 15 per day. On March 22 these were beginning to be issued to the regiments of the 5 Canadian Armoured Brigade. Ibid. March 1944.
- 99 J.M. McAvity, "Account of Operations 31 Aug 44 - 1 Sep 44", Ibid., September 1944, Appendix 7.
- 100 Such ineffectiveness caused the Princess Louise Dragoon Guards to be rebadged as infantry. "Weekly Summary No. 11 - Summary of the Causes of Delay in the Eighth Army's Ad[vance] in the Liri Valley from 'D' Day to Capture of Anagni", Canadian Military Headquarters, "Canadian Military Headquarters Reports - Operations and Administration - 1st Canadian Corps," 21 July 1944.
- 101 Fireflies were to arrive in late October 1944 at the rate of sixteen per regiment. Shermans with 105mm guns arrived in theatre in December. Marteinson, 223.
- 102 5th Canadian Armoured Brigade Headquarters War Diary, "Report on Operations - 2 Canadian Armoured Regiment LdSH 11-19 Oct. 1944," October 1944, RG24, C-3, Vol. 14057. Reel T-10662, Library and Archives Canada.
- 103 "Intelligence Summary No. 5", 1 Canadian Corps General Staff War Diary, January 1944.
- 104 "Weekly Summary No. 11, 1 Cdn Corps - Summary of the Causes of Delay in the Eighth Army's Ad[vance] in the Liri Valley From 'D' Day to Capture of Anagni", Canadian Military Headquarters, "Canadian Military Headquarters Reports - Operations and Administration - 1st Canadian Corps" 21 July 1944.
- 105 Further compounding problems, the same route had different names when used by different corps. Delaney notes that a problem of traffic control was the lack of personnel in the hundred man divisional provost company. Delaney, 133, 128.
- 106 Poor reporting back to higher headquarters is cited as part of the problem, but Delaney claims that Leese should have known better. Delaney, 143-44.; Martienson and McNorgan instead place blame with "an inexperienced divisional staff" and a 5 Canadian Armoured Brigade Headquarters "gripped by paralysis." Marteinson, 196.
- 107 "The Crossing of the Melfa and the Securing of a Bridgehead by 5 CDN ARMD BDE GP," "5 Canadian Armoured Brigade Headquarters War Diary," 4 June 1944. Vokes attributed the cohesion to three day tank-infantry training sessions on the company squadron level. "Notes on Activities, 1 Cdn Corps - Comments by Major General C. Vokes, D.S.O., on the Operations of 1 Cdn Div in the Liri Valley, May 1944," Canadian Military Headquarters, "Canadian Military Headquarters Reports - Operations and Administration - 1st Canadian Corps," 29 June 1944.
- 108 McAndrew, *Canadians and the Italian Campaign*, 116.
- 109 Winston S. Churchill, *The River War: An Account of the Reconquest of the Soudan*, New York: Carroll and Graf Publishers, 2000, c1902, 162-163.
- 110 That 13 three-ton trucks meant to be dropped off on Pachino Beach were not dropped off the ships and headed to Tunis exacerbated the supply and transport problem in the opening days of the Sicilian campaign. Warren, *Wait for the Waggon*, 235.
- 111 Ibid., 239.
- 112 Interview with Al Sellers, Governor General's Horse Guards. McAndrew, *Canadians and the Italian Campaign*, 84.

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- 113 "S&T Maintenance Cdn Corps: Second Maintenance Plan" M. V. McQueen, *Logistics at war* (Hamilton, Ont: M.V. McQueen, 1978) , 18 October 1944.
- 114 Warren, 209.
- 115 Due to dusty conditions in the fall of 1943, the Norton's suffered from barrel scouring that was ameliorated by machining the barrels. William F. Rannie, ed., *To the Thunderer His Arms: The Royal Canadian Ordnance Corps* (Lincoln, Ontario: William F. Rannie, 1984), 136.
- 116 "Report On RCASC Services - 1 CDN INF Division", Warren, *Wait for the Waggon: The Story of the Royal Canadian Army Service Corps*.
- 117 *Ibid.*, 117.
- 118 *Ibid.*, 262.
- 119 Goddard, 18.
- 120 McAndrew, *Canadians and the Italian Campaign*, 28.
- 121 A mule stowing school was operating in Casona in March of 1944, a Mule School was then also operating in the 1st Canadian Division, and a Mule Pack Transport Instructional Cadre was allotted to the I Canadian Corps Troops of the Royal Canadian Army Service Corps. The Cadre worked with 16-20 mules for the summer of 1944. Mule Pack Transport Instructional Cadre War Diary. March 1944. Library and Archives Canada. RG 24, Volume 16,851. In March 1944, representatives of the Lord Strathcona's Horse were sent to the mule stowing school. By April muleteers were being trained for the 5 Armoured Brigade in the 1st Division's Mule School 5 Canadian Armoured Brigade War Diary, 2 March 1944, 3 April. Warren, *Wait for the Waggon: The Story of the Royal Canadian Army Service Corps*, 240.
- 122 *Ibid.*, 47.
- 123 McAndrew, *Canadians and the Italian Campaign*, 111.
- 124 Historical Report - 1 Canadian Armoured Brigade Company (83 Coy) R.C.A.S.C. (10 Jul 1943 - Nov 1944) McQueen, *Logistics at War*.

Task Forces: Making Canadian Armour Operationally Effective in Italy, 1943-1944

Christine E. Leppard

On 24 May 1944, I Canadian Corps unleashed three battalion sized task forces through the remnants of the once-vaunted “Adolf Hitler Line” up Italy’s Liri Valley. Manned by some of the Third Reich’s best divisions in Italy, the “Hitler Line” had been a formidable barricade of wire, anti-tank ditches, artillery, and machine-guns that stretched from the Adriatic coast through the Liri Valley; the Germans had been determined to protect Rome at all costs from the advancing Allies. After four days of concentrated, set-piece brigade attacks by Major-General Chris Vokes’ 1st Canadian Infantry Division (1CID), a hole had been punched through the line between the towns of Pontecorvo and Aquino. The exhausted 1st Division then passed the baton to Bert Hoffmeister’s 5th Canadian Armoured Division (5CAD) to complete the “break-out” phase. Hoffmeister organized task forces—super-sized battalions of motorized infantry, armoured vehicles, self-propelled artillery and engineers under one battalion commander—to chase the scrambling Germans, maintain pressure, and prevent them from re-establishing a defensive posture. Task forces were designed to hit hard, moving fast and relentlessly.

Task forces were the progeny of Canadian tactical innovation during the Italian Campaign, developing from their attempts to adapt “fire and movement” doctrine so that even in Italy’s rugged terrain, armour and infantry could coordinate and advance to contact quickly. From Sicily to the Hitler Line, task forces met with considerable success. Against German troops lightly holding a position before waging a fighting retreat with rear-guard delaying tactics, task forces had the speed and strength to keep up the pressure. In the Liri, however, Hoffmeister’s breakout fell far short of Eighth Army’s expectations. Unlike previous task force engagements, small-arms fire was a major threat to 5CAD, pinning down the leading infantry. And although pre-battle training had emphasized the need to avoid situations where tanks led the assault, contingencies were not rehearsed to deal with occasions when they did. In all three Liri task forces, coordination broke

down into disparate infantry and tank attacks losing speed and momentum and, consequently, the ability to maintain pressure on the retreating Germans. Recognizing that the task forces at Liri had insufficient strength to meet the situation, Canadian commanders did not use task forces again until faced with lighter resistance. The breakthrough of strong German positions was thereafter left to traditional brigade assaults. Ultimately, the study of task forces in the periods preceding, during and in the aftermath of the Liri Valley demonstrates the maturity of the Canadian learning curve by May 1944. Task forces had developed as a method of adding speed and flexibility into Eighth Army tactical doctrine, and yet the Canadians had the capacity to understand their limitations, without reactively abandoning the entire concept when confronted by setbacks.

As Will Pratt demonstrated in his chapter, historians have typically concluded that Italy was not “tank country” and terrain limited the operational effectiveness of armoured units. Making matters worse was British armoured doctrine, moulded primarily by the mechanical and calculated Bernard Montgomery who operated with strict fire plans and a deliberate end game. I Canadian Corps was under the command of Eighth British Army in Italy and naturally fought by the Montgomery method, by which three phases were considered necessary to crack prepared German defences. According to 1st Canadian Infantry Division’s (1 CID) 1942 training instruction, the first phase of an attack, “is based on fire and movement and timings are co-ordinated to control these factors.”¹ In the second phase tanks and infantry work together to reduce the remaining pockets of resistance. Phase three comprised a combined-arms echelon to exploit success by applying pressure on the retreating Germans.² This phase was to be spearheaded by an armoured division, which was designed specifically to facilitate all-arms coordination. In all phases, limited objectives were to be consolidated because, as General Officer Commanding (GOC) 1CID Guy Simonds wrote, “The success of the offensive battle hinges on the defeat of the German counter-attacks.” More importantly, “The defeat of these counter-attacks must form part of the original plan of attack which must include arrangements for artillery support and the forward moves of infantry supporting weapons – including tanks – on the objective.”³

Historian Bill McAndrew criticized the Canadian approach, arguing about the Sicilian Campaign that, “relying on firepower seemed to induce a tactical outlook which restrained the initiative on which battlefield manoeuvre depends.”⁴ However, after 10 July 1943 when the 1CID landed on the beach of Pachino, Sicily, experience taught the Canadians that there was

room for manoeuvre and initiative within the strictures of Eighth Army doctrine. The concept of task forces originated in the 1 CID attack on Leonforte on 22 July 1943, when the Loyal Edmonton Regiment became bogged down in the town. Prevented for 24-hours from coming to their rescue while they waited for engineers to repair the bridge leading to the town, Vokes and Simonds launched a 'flying column' up the switchbacks to Leonforte. One section of the Three Rivers Regiment and one platoon of the Princess Patricia's Canadian Light Infantry (PPCLI) were married up under the command of the PPCLI's commander Captain R.C. Coleman.⁵ With speed and coordination, the formation met with considerable success.

The idea was expanded upon in mid-August, when the 1 CID was ordered by Montgomery to maintain pressure on the Germans who were rapidly retreating towards the Etna Line, and blowing bridges, destroying ammunition stores, and mining roads as they went. "Booth Force," commanded by Colonel E.L. Booth of the Three Rivers Regiment, was composed of the armoured regiment, a self-propelled battery, anti-tank guns, the Seaforth Highlanders infantry regiment led by Bert Hoffmeister, and a reconnaissance squadron. Designed to maximize speed and flexibility, Booth Force was to strike east along the Northern bank of the Salso River, bypassing the German positions at Mounts Seggio and Revisotto, with the final objective of getting a toehold on the eastern bank of the Simeto River. "I think such a move," Simonds wrote on the night of 4 August, "will startle the enemy and will probably result in a good mix up in the open country where the tanks will really be able to manoeuvre."⁶ As historian Douglas Delaney points out in his biography on Hoffmeister, Simonds' decision to pass by Seggio and Revisotto leaving the Canadians' left flank exposed, "was a departure from the doctrinal practice of establishing firm bases and securing the flanks before commencing an advance."⁷ Yet Booth Force was designed to maximize speed and flexibility to a limited objective, not propel a Patton-style breakout of the river valley.

It worked, and well. Booth, with Hoffmeister beside him in his command tank, sent the Seaforths forward mounted on tanks of the Three Rivers. When the tanks were held up at the river, the infantry dismounted and pressed onward, with the tanks providing direct fire support. Communications were netted, and organization fluid; the operation was a resounding success. In the weeks after Booth Force and in preparation for the move to the Italian mainland, the Three Rivers Regiment and the rest of 1st Division attempted to institutionalize the lessons they had learned on infantry-armour cooperation in Sicily. Although task forces were not

discussed directly, their lessons were clearly discerned. For example, in a question-answer session with the 12th Canadian Armoured Brigade (The Calgary Tanks), Booth made it clear that tanks should never attack before infantry:

During action the procedure is as follows if the tanks are leading: the tanks bump opposition. All the fire from the enemy position is directed against the tanks and the area behind where the Infantry would be. Appalled by the fire, the infantry will go to ground and are no more use during the action...If the tanks are kept well back of the Infantry and give direct fire support when the Infantry are nearing their objective or meeting opposition the Infantry will go to ground but for their own protection will engage the enemy. The tanks can then determine, either by hand signals from the Infantry or verbal messages, where the opposition is coming from and can engage it from the best position.⁸

In Italy, while trying to maintain pressure on the Germans as they retreated north to the series of defensive positions orchestrated by General Albert Kesselring, the Calgary Tanks would cooperate in two task forces: Boforce and X-Force.

During the last months of 1943, the Canadians captured Ortona in one of the longest and bloodiest fights of the Italian Campaign. Afterwards, they were moved to a quiet sector around Campobasso to rest and train. During this hiatus, Montgomery handed over command of Eighth Army to Oliver Leese, so that Montgomery could return to England for "Overlord." Harry Crerar's I Canadian Corps headquarters arrived in the Mediterranean in November, and by January it was organized and operational. Under Crerar's command were 1st Canadian Infantry division and the newly arrived 5th Canadian Armoured Division. Although Crerar pressured Leese to get I Corps into action as soon as possible, his attempts were in vain; not only did Leese believe that I Corps and 5CAD were insufficiently trained for battle, the inclement weather prevented any operation at all for the first three months of 1944.⁹ By the time I Corps did go into battle in May, Crerar had returned to England to command First Canadian Army, and General E.L.M. "Tommy" Burns had taken over. Chris Vokes was promoted to GOC 1CID, and Hoffmeister to GOC 5CAD.¹⁰ Aside from one operation in January (the Arielli Offensive), I Canadian Corps would spend the months

January to May training in preparation for their turn at the crack German defences dug-in to the Liri Valley anchored by Monte Cassino, blocking the road to Rome.

Much of the Canadians' training in this period was focused on all-arms coordination. In early March, 1CID organized "Unit Study Periods" which invited representatives from infantry, armour, artillery, engineer, and medical units to attend "so that all may benefit from other arms represented." Their topics of discussion were, "time spent in preparation," "joint planning between infantry, tanks and artillery," and "the employment of tanks and infantry in break-in-battle."¹¹ Fostering discussion between battalion commanders who had been—or might later be—working together in combined-arms operations was an important component of their training. On 21 March 1944, 1CID was asked to supply 10 officers and 54 non-commissioned officers to I Canadian Corps to help "improve the standard of training" by discussing lessons learned and training practices. They were then to return to their own units and instruct their peers how to train.¹²

Most importantly, 1CID focused on training officers, non-commissioned officers, and troops in infantry-cum-tank attacks on the squadron-company level. On 28 March 1944, in "Training Instruction No. 3: Drill for Tank and Infantry Cooperation – [Squadron] and [Company] Basis", I Canadian Corps ordered a "common basis between [squadron] and [company] commands" to be found and argued that "a plan must be evolved which will include all the necessary details" for all-arms coordination.¹³ A major training exercise was staged at Lucera that focused on brigade groups comprised of mortar units, forward observation officers (FOOs), infantry and other support arms operating under brigade control. 1CID worked with the 25th British Armoured Brigade. It was hoped, in particular, that the combined forces would "exercise the sappers, [Anti-tank] gunners and FOO parties from the [Field Artillery] as well as the [infantry]."¹⁴ For example, the 3rd Canadian Infantry Brigade trained with 142nd Royal Artillery Corps and 51st Squadron of the Royal tanks, further grouping into battalion and squadron formations.¹⁵ These groups were not to be permanent. Joint-attacks would be rehearsed to ensure interchangeability. Although the emphasis of 1CID was "marrying-up" for break-in battles, skills were being developed that could also be applied to task forces. An 8 May training directive issued by 5CAD warned that training exercises might, "have not necessarily any perspective operational significance, but are for the purpose of providing practice and training in the planning of an operation."¹⁶

The Carleton and York Infantry regiment, part of Adams Force in the Liri Valley, attended the 1st Division's training near Lucera in April 1944. The five foci of training were stipulated as:

- (a) Attack by [tanks] and [infantry]
- (b) Action on the objective with [tanks] in the anti-tank role and in the counter-attack role.
- (c) Passage of minefields.
- (d) Co-operation with [Anti-tank] guns including towing.
- (e) The Churchill tank to all and maintenance problems to [officers].¹⁷

Then, on 5 May, the Carleton and Yorks' regiments were "given an opportunity of examining both the Churchill and Sherman Tanks with the tank crews [of the 51st Royal Tank Regiment] present to explain points of construction and mechanism."¹⁸ The next day, they engaged in training exercises with the squadrons and live-fire training with anti-tank units.¹⁹ This first-hand examination of the strengths and weaknesses of Churchill tanks helped strengthen the Carleton and Yorks' understanding of how mutual support could be provided and improved.

Some of the early lessons of Booth Force were now standard operating procedures, particularly regarding communications and attack formations. For example, at Lucera, the Carleton and Yorks conformed closely to the tactical outlines set forth in I Canadian Corps' "Training Instruction Number Three" which was disseminated to all units. Specific attention was afforded to communications, most importantly radio nets: "armour net to infantry. 18 set in tank to battalion command net, 38 set in tank to company command net."²⁰ Having both tank and infantry wireless sets in the command tank facilitated quick support. The Instruction goes on to remind its companies that when marrying-up, they need to co-ordinate with the tanks where they will form up, timings for arriving troops, and pick guides from platoons and troops to go over routes to the forming up area. When the battle is underway, the "main role of [tanks] is to [support] infantry – when possible [tanks] will move close enough to [infantry] to obtain target indications. In close country such as olive groves, [tanks] must fall back, as cannot see to shoot, but will close again as soon as ground permits."²¹ Notably absent from the training document is the procedure to be taken when infantry are held up by small arms fire that tanks are impervious to.

A similar training regime was occurring in 5th Canadian Armoured Division. In April, Hoffmeister's division conducted two "battle drills": SLUGGEM and THRUSTER. During the former, Hoffmeister organized a Tactical Exercise without Troops (TEWT) in which rifle company and tank squadron officers worked together in syndicates to plan attacks, which were then executed in dry runs. The purpose of SLUGGEM, according to Delaney, was "to develop sound procedures for infantry-tank cooperation, which meant working on methods for communication, command and control, target indication, and battle procedure."²² Battalions rehearsed netting armour wireless sets to infantry. Placed in the command tank were to be number 18 and number 38 wireless sets. The number 18 would be in contact with battalion command, while the Number 38 was to be netted with the infantry company.²³

THRUSTER was a live-fire division rehearsal of the skills and concepts developed in SLUGGEM. Hoffmeister grouped infantry and tank regiments together in predictable arrangements, ensuring that his troops were familiar with broad methods of cooperation that could then be applied in whichever organization he envisioned.²⁴ Creating command and operational flexibility and familiarity was key.

The combined arms lessons learned in Sicily and the first few months of Italy had sunk in at I Canadian Corps headquarters. While task forces were never the direct focus of training, both 1st and 5th Canadian divisions rehearsed the skills and tactics that could be applied to the battalion-led attack formations. In May 1944, I Corps was given a chance to test its training in action.

Since January, the Allied Armies in Italy had tried three times to crack the German Gustav Line, which ran from Monte Cassino across the Rapido and Garigliano rivers through the town of San Angelo. The strength of the German defenses combined with difficult winter conditions led to the decision to wait until spring to launch a fourth attempt. After the Gustav Line had been pierced, I Canadian Corps was to assault the Hitler Line, which ran from Monte Cassino through the towns of Pontecorvo and Aquino and down the Melfa River through the Liri Valley, just north of the Gustav Line. The Hitler Line was the last German defensive system before Rome. As per army doctrine, I Corps tasked Vokes' 1CID first to break-through the line, and Hoffmeister's 5CAD then to break-out of it. It was in the break-out phase that Hoffmeister employed task forces.

The Liri Valley breakout demonstrated that the combined-arms operations typified by task forces were still in a period of transition in May of

1944, and that the usefulness of task forces had a limit. Indeed, until the Liri the formations had not yet been tested against stiff German resistance, and they did not hold up well. Although the task force command structure ensured that tanks and infantry married up swiftly, coordination broke down once the battle was under way because the forces lacked the overwhelming strength to break the desperate Germans scrambling to re-establish a defensive line.

By 24 May, Vokes had punched a hole through the line between Pontecorvo and Aquino. Hoffmeister and 5th Canadian Armoured Brigade Commander J.D.B. Smith organized Vokes and Griffin Forces. Named after Chris Vokes' younger brother Major Fred Vokes of the British Columbia Dragoons and leader of the task force, Vokes Force consisted of squadrons of the Dragoons, companies of the Irish Regiment (lifted from 11th Canadian Infantry Brigade), a self-propelled battery from the 4th Anti-Tank Regiment, Royal Canadian Artillery, a section of the 7th Light Field Ambulance, and a detachment of Royal Canadian Engineers 10th Field Squadron.²⁵ Vokes was to lead his battle group to Mancini Farm, where Griffin Force would take the lead to the Melfa River. Griffin Force, led by Philip Griffin of the Lord Strathcona's Horse, was supported by A Company of the Westminster Regiment (mounted infantry), and units of the same support regiments used in Vokes Force. In support, Chris Vokes organized "Adams Force"—so named for the battle group's leader, Major Adams of the Princess Louise Dragoon Guards. The force included a squadron of Sherman tanks of the Royal Canadian Dragoons, two squadrons of Three Rivers Regiment (Shermans) borrowed from 1st Canadian Armoured Brigade and the Carleton and York Regiment.

To Vokes and Hoffmeister, the tactical situation in the Liri Valley looked familiar. The Germans were retreating, and the Canadians were chasing them to ensure that they could not dig in and counter-attack. These same challenges had faced the Canadians in Sicily: (1) the need for speed; and (2) the nature of the terrain and German defences. As in Booth Force, "tank speed" was needed to quickly reach and cross the Melfa River before the Germans could dig in. Therefore, all three task forces were organized under a tank commander, who in previous months' training had worked with infantry and artillery commanders to integrate tactics. The theory was that, to maintain the speed of the attack, the tank commander could best utilize infantry to ensure that it screened the tanks.²⁶

Hoffmeister did not have a lot of space to work with when organizing his attack. The entire front, from the boundary line with XIII British Corps

on the right to the Liri River on the left, was only three to four miles wide.²⁷ More importantly, Vokes had his foot in the door but the gap was not big enough to move a brigade through. Hoffmeister recalled that, "I was in Chris Vokes' headquarters right up to the time we moved off and I'll never forget the moment when Chris turned to me and said, 'Bert this is the best we can do, there is not much of a hole, good luck to you.'"²⁸ In the staging area on 23 May, the traffic was so congested that one sleeping Strathcona Trooper was crushed by a tank from the Governor General's Horse Guards next to his own Sherman.²⁹ To make matters worse, on 24 May, Leese designated the main highway through the valley—Highway 6 or "Heart Route"—the "sole preserve" of XIII Corps.³⁰ The Canadians were thus relegated to secondary, mostly unpaved, roadways. This meant that there was not enough room to launch an effective division or brigade level assault.

Although the 90th Wehrmacht Division had been substantially weakened during the break-through, it faced only "the prospect of a walk over the mountains, should [it] wish to break off the fight and rejoin the main body."³¹ German Panthers and Mark IV's exceeded the Canadian Honey and Sherman Tanks in numbers and power, German snipers and infantry units honey-combed the orchards and the main roadways to the Melfa were festooned with mines.³² Furthermore, 5CAD's right flank was exposed, as the Germans still held the heights of Aquino, which was located in XIII British Corps' sector with enfilade over the Canadian line of advance.³³ A successful breakout rested on speed and flexibility to quickly overcome or bypass strong German defences.

The Liri Valley terrain was also a tactical challenge. As Philip Griffin wrote in an article after the conclusion of the Italian Campaign, "Fire and movement was difficult as squadrons oft [sic] times moved...through sunken roads and cross traffic creeks."³⁴ Lieutenant Perkins, commander of the Strathcona's reconnaissance squadron that led Griffin Force, agreed. In his 'Account of Action,' he reported that one of his tanks got lost in the difficult country en route to the Melfa. Moreover, the crossing of the Melfa was, "a sort of ledge leading down into the river bed. This was very steep and difficult but still passable to tanks."³⁵ To top it all off, heavy rain had reduced roads to mud. Engineers would have to play a prominent role overcoming obstacles, while direct infantry support lessened the vulnerability of tanks as they traversed this difficult terrain. These elements would help armoured units maintain as rapid a pace as possible while clearing the strong German resistance.³⁶ These considerations led Hoffmeister and Vokes to conclude that task forces would provide the necessary strength and combination of arms

to reach and establish firm bases on their objectives. The Adams, Vokes and Griffin forces were created.

Initially, the pre-battle joint training paid off, as was particularly apparent in the effectiveness of the command structure, the “marrying-up” of tanks and infantry for deployment, and capable communication coordination. Training had focused on creating understanding and trust—a team approach—between all units. Therefore, the tank commanders in charge of each task force were able quickly and effectively to coordinate plans to integrate. On 21 May, the commanding officer of the 11th Canadian Infantry Brigade’s Irish Regiment of Canada (infantry), Lieutenant-Colonel R.C. Clarke, attended a conference where he was informed that his regiment was now under 5th Canadian Armoured Brigade, and was to be “ready to operate in an armoured role.”³⁷ The next day, the regiment was informed that it was to be part of Vokes Force, and on the 23rd the regiment moved to the forming up area, awaiting the next day’s attack. To ensure that his infantry regiments could keep pace with their tank counter-parts, Hoffmeister had stripped the Bren gun carriers from every unit in his division. He was able to gather enough to carry two companies of the Irish Regiment. The rest of the Irish were to ride on the back decks of the reserve tanks.³⁸ Clarke and Vokes of the British Columbia Dragoons spent the night in the conference, and the attack went in the next morning.³⁹

The Irish and British Columbia Dragoons had less than twenty-four hours to prepare; their thorough training paid big dividends. By 0800 hours, 24 May, the wireless sets were netted, and the units formed at the start line. The assault went in with B Squadron on the left, C Squadron on the right, and A Squadron in the rear. The Irish rode on the tanks or in the carrier vehicles alongside. As the Irish’s war diary romanticises, “they swept away all resistance before them with hearty and eager determination.”⁴⁰ Delaney concludes that, “The Dragoon/Irish battle group might not have possessed the full hitting power of a brigade, but, in the short term, the task force could move and shoot without outside help.”⁴¹ Effective training and command structure ensured that the marrying-up of tanks and infantry occurred quickly and effectively.

The story was very similar for the two other task forces. On 17 May, the Strathcona commander, Lieutenant-Colonel Philip Griffin, held a conference in Regimental headquarters to discuss the operation of a regimental group; representatives of A Company of the Westminster regiment attended. The discussion included (1) the axis of advance; (2) the advance in close country; (3) the advance in open country; and (4) crossing an obstacle.⁴² On the mor-

ning of 21 May, Griffin attended an Orders Group in Brigade headquarters, where he was given numbered air photographs of his objective, and assured of air and artillery support during his advance. Griffin then passed information to all units under his command, including the Westminsters.⁴³ He next proceeded to make some important changes necessary to effectively integrate command, communication and control. The Strathcona reconnaissance squadron, led by Lieutenant Perkins, was reduced to five tanks when six of his Stuart or 'Honey' tanks were given to the engineers.⁴⁴ Griffin organized the first regimental net used by the Strathcona's headquarters; all wireless sets were tuned to the same wavelength so that everyone could hear everything that was transmitted. Normally the Strathconas operated on a different wavelength for each squadron, so that they could quickly train and include new units.⁴⁵ While the Strathconas had never employed the communication technique in battle before, integrated training gave Griffin the knowledge and competence to coordinate communications before the task force 'jumped off'. At 11:32 on the morning of 24 May 1944, orders were received to move immediately. According to Griffin:

The formation adopted was one squadron up, [reconnaissance troop] leading, followed by "A" Squadron in diamond formation. RHQ [Regiment Headquarters] and "A" Coy [Company] Westminsters travelled in white scout cars, following; two squadrons flanking rear "B" right "C" left each covered by a carrier platoon from the [Westminsters]. Behind the tanks followed the [Self-Propelled Anti-Tank Battery], the [Self-Propelled Field Battery], and the Jeep .75 mm [Battery].⁴⁶

The first time Lieutenant-Colonel Danby of the Carleton and Yorks liaised with Lieutenant-Colonel Adams of the Princess Louise Dragoon Guards was on the morning of 24 May. Adams issued Danby instructions, and coordinated marrying-up. The Carleton and Yorks were picked up by troop carriers and transported to the staging area aside the Liri River near Pontecorvo. The assault began the same day. The D and C companies first moved in carriers, followed by headquarters and support units.⁴⁷

In all three cases, the task force command structure was able expeditiously to carry-out marrying-up as had been rehearsed in the months before. This was a testament to the fluid bottom-up/top-down instituted learning system in place in the Canadian Corps, as well as the adaptive command structure focused on battalion headquarters. All task forces began

their engagements effectively integrated under one battalion headquarters. However, when the ‘fog of war’ descended, the task forces were faced with a situation that previous experience and training had not fully prepared them for: what would happen to the integration of the task force when infantry were pinned down and could no longer lead the attack? Previous task forces had not faced such determined resistance. Two generalizations can be made about the experiences of each of Hoffmeister’s three task forces on 25 May. First, tanks continued forward without infantry support thereby making themselves vulnerable; second, communications broke down and the infantry and tanks failed to provide mutual support until they had each reached their objective.

According to Lieutenant-Colonel Landell of the Princess Louise Dragoon Guards, the chaos of the German retreat presented difficult conditions that were not to be underestimated. He later wrote of the chaos behind the Hitler Line:

No one knows anything for certain and it is the unexpected which generally happens.... Infantrymen form up for the attack and discover that the objective is held by their own troops. Medical orderlies, on their way to the rear with wounded, pass through strongly held enemy positions and wave greetings, thinking that they are in their own reserve areas. Men are captured and in ten minutes accept the surrender of their captors. And above all fear, exhaustion, and lack of information rises over an insistent demand for speed, speed and more speed – deep into the rear of the enemy, to strike at his supplies, spread confusion wider and wider, turn his retreat into a rout and prevent him from forming another line.⁴⁸

The Germans had shown over and over that simply breaking through their lines would not break their spirit. Commanders needed to break their will to fight with speed and overwhelming force; task forces were the answer in an Allied attempt at operational *kesselschlacht*.

In practice, the ambitions for task forces collided with practical difficulties. Shortly after Adams Force began advancing, bottlenecks forced the two leading Carleton and York companies to “revert to the familiar foot-slogging method of advancing” and did not advance with the tanks.⁴⁹ Meeting light resistance, both the tanks and infantry took time to round up German prisoners. The Carleton and Yorks arrived in a little gully two miles short of the

Melfa at about the same time as the lead squadron of the Royal Canadian Dragoons.

Communications between the tanks and infantry had broken down when the infantry dismounted from their carriers and the two units lost contact. Maintaining effective communications was the foundation upon which task force success was built. In the end, thanks in part to the unified command structure and integrated communications, Adams force met up at the river and coordinated a set-piece attack over the Melfa on 25 May. As was consistent with training doctrine, the tanks gave direct supporting fire from the near bank of the Melfa, while the infantry crossed the river and established a bridgehead. The tanks then followed the infantry across. They consolidated the bridgehead and waited for the next phase of the assault to leap-frog their position.⁵⁰ The advantage of the task force command structure was that when the units of Adams Force assembled on the bank of the Melfa, Adams was able to re-coordinate and launch an effective attack. He was only successful, however, when the infantry were able to lead the tanks. Because the reverse was well-known to be a dangerous formation, training time had been spent making infantry-led attacks work. Contingencies for separation and tank-led attacks had not been established, and Adams Force paid the price.

A similar pattern of events happened with the Vokes Force. Traversing a maze of groves and small pockets of cultivated fields in a thick morning fog, Vokes Force got lost. This was not the problem, however, as task forces were designed to be able to react and overcome any battlefield contingency. The difficulty was that the tanks and infantry lost contact. Sergeant William Kurbis was in A Squadron's Number One troop, which was in reserve behind the lead squadrons. He saw the Irish on the back of one of the tanks in front of him jump off. Initially believing that they had been knocked off by a tree branch, Kurbis stood higher up in his turret to coordinate with the men on the ground. Sniper bullets quickly educated him about why the infantry had dismounted. The infantry scattered into the woods to clear out the Germans. The tanks kept advancing. The tanks and infantry fought separate battles to Mancini Farm.⁵¹

This was the very situation that task forces feared, and training had striven to avoid. Infantry and tanks were separated and lost, unable to give each other the protection needed while trying to re-locate their line of advance and reach their objectives. Experience had taught them that infantry were crucial in protecting tanks, as they had the ability to deal with both mines and anti-tank guns. When B Squadron's Number Four troop turned

a corner looking for a ground feature to get the squadron their bearings, they encountered a Panther Tank. The Panther swung its gun toward Troop Commander Lieutenant Nigel Taylor's tank. Trooper Cecil D. Shears blasted two armour piercing shells into the side of the Panther, disabling it. However, two antitank guns flanking the Panther opened up on Taylor's tank, tearing off his cupola.⁵² Number Four troop was able to destroy both guns. If the infantry had been leading they could have, as training tactics stipulated, out-flanked and knocked out the anti-tank gun while the Sherman despatched the Panther.

Moreover, because of the separation, the tanks reached the objective ahead of the infantry and ran into heavy resistance, but after a short fire-fight the reconnaissance units managed to consolidate Mancini Farm. The first units that arrived to support them were the Dragoons, followed by self-propelled guns. The Irish, however, did not arrive until hours later. This meant the tank and artillery units had to consolidate the objective as best they could without an infantry screen. Some of the reconnaissance units had to dismount and form a defensive perimeter around the tanks. The Vokes Force took its objectives, but experienced the same problems as the Adams Force. The Vokes Force lost speed as communication, integration and tactical procedures broke down once the attack was underway, demonstrating that infantry-tank coordination was still in a period of transition. While some confusion was expected, without an established contingency plan the integration of the Vokes Force disintegrated beyond restoration. Unlike the Adams Force, the infantry and tanks of the Vokes Force were unable to re-integrate and the Griffin Force had already passed through Mancini Farm when the Irish Regiment arrived at the objective.

By 1500 hours 24 May, the Griffin Force's reconnaissance units, led by Lieutenant Perkins, had reached their crossing on the Melfa, which was a small, secondary route at the junction point of two German corps.⁵³ The Germans were caught looking, and Perkins was able to get his tanks across the river without any determined resistance. However the Germans quickly realized where the brunt of the Canadian attack was directed, and began a concerted armoured counter-attack against the position.

The task force was theoretically prepared for this contingency. Working together, tanks and infantry ought to have strengthened Perkins' tenuous bridgehead, and repelled the German counter-attack. Again, however, the inability of tanks and infantry to remain coordinated throughout the campaign proved problematic. The Westminsters were travelling in White scout cars alongside the Strathconas. The force encountered unrehearsed difficul-

ties in terrain that slowed down the progress of the infantry cars but not the tanks. Engineers were on hand to assist the infantry but progress was far slower than planned. The Strathconas advanced on alone. The A Squadron reached the bank of the Melfa but was unable to cross and support Perkins when it became engaged in a fierce firefight with enemy Panthers located on the opposite bank.⁵⁴ For a while, two separate battles were fought: Perkins' unit was engaged with tanks and infantry on the far bank, and A squadron was engaged with Panthers on the opposite bank.

Perkins immediately called for infantry backup, and was finally reinforced with the arrival of A Company of the Westminsters. Major J. Mahoney, commander of the Westminsters, had dismounted the company and raced for the Melfa. Engaged in their own battle, the Strathconas were unable to provide direct fire support to the infantry, who, only one company strong, were equally unable to silence the German tanks and infantry on the far river bank. The task force was able to hold the bridgehead largely thanks to the individual effort of Mahoney. Later awarded a Victoria Cross for his unshakeable resolve, Mahoney ran between reconnaissance, infantry and Strathcona units on both sides of the river trying to get the effort organized. Perkins and Mahoney were able to coordinate an attack with fire support from the tanks' hull down position in order to clear a house being used as a German stronghold.⁵⁵ Moreover, by firing all their weapons at once from behind the bank of the River, they were able to deceive a German counter-attack into believing that the bridgehead was held by a larger force. They remained dug-in until the next morning, when 11th Canadian Infantry Brigade passed through their position to continue the attack. While the determination of Griffin Force at the Melfa was able to salvage a victory out of the German counter-attack, the job may have been easier had all units of the Westminsters dismounted and quick marched forward to the bridgehead. Instead, most of the motor company slowly felt "its way forward over difficult country going in the face of artillery and small arms fire."⁵⁶

In the aftermath of the campaign, corps, division and support unit commanders agreed that the pursuit phase of the operation had been far too slow. The main causes: "a lack of appreciation of the enemy and the plight he was in, and a lack of [training] and planning for pursuit."⁵⁷ The task forces, particularly the Vokes and Griffin Forces, conducted by the armoured brigade, were the focus of much disappointment. The battalion groups were stretched too thin to effectively maintain 'tank speed' onto the objective. Lessons were learned that suggested task forces were the improper formation for future

break-out battles. First, it was felt by all commanders that more infantry support was needed. While Hoffmeister had moved an infantry battalion under the command of 5th Armoured Brigade, he concluded that the infantry had not been used to its fullest potential. “[Commanders] should therefore, avoid if possible allowing this extra [infantry battalion] from becoming closely involved in the battle. It can well be left under [command of] the [infantry] in [support] of the armour.”⁵⁸ The armoured brigade needed extra infantry to rush forward to target areas when they developed. Artillery heard a similar critique. The division had handed over too many field regiments to the brigade, which then further decentralized them. A more efficient coordination was to rest the support of only one field regiment with the armoured brigade headquarters.⁵⁹ In sum, it was decided that while small-unit infantry and tank coordination was necessary, more control had to be maintained by the brigade headquarters such that forces could be concentrated on key areas to maintain the speed of the attack.

Following standard procedure, after battle lessons were gleaned from the operations, and I Canadian Corps issued “Training Instruction Number Four The Pursuit”. Some of the tactical problems incurred by Griffin Force were to be avoided by having the infantry “go forward without [their] [vehicles]” in situations where “demolitions hold up [vehicles] of infantry and infantry support arms”.⁶⁰ Thereafter, 5th Canadian Armoured Division’s training focused on fixing some of the tactical problems encountered in the Liri Valley. For example, in August the division conducted “Exercise Canyon”, during which wireless silence was kept, forcing infantry and tanks to rehearse using visual signals.⁶¹ This would ensure that when the infantry were pinned down a degree of cooperation would be maintained.

The most important lesson from the Liri Valley campaign was that in the face of stiff German resistance, task forces did not have the strength or coordination to move with adequate speed. The ability to learn this lesson demonstrates the maturity of the institutionalized learning structure practiced by the Canadian Corps. In the attack on the Gothic Line in October 1944, 5th Canadian Armoured Division was again to lead the breakthrough towards Rimini. Hoffmeister re-grouped his forces, for example, so that the Princess Louise Dragoon Guards reconnaissance regiment could lead the 11th Canadian Infantry Brigade attack, and 5th Canadian Artillery Regiment had a battery of towed anti-tank guns.⁶² Within his formations, brigade headquarters maintained control. Infantry and tanks “married up” but remained under the command of their own battalions, who were responsible to brigade headquarters. The lessons had been learned from the Liri.

The Liri Valley campaign was the high point of I Canadian Corps' learning curve vis-à-vis task forces. Prior to the battle, 1st Canadian Infantry Division and 5th Canadian Armoured Division worked hard to implement and rehearse the lessons learned in previous campaigns, particularly regarding communications, marrying-up and attack formations. For the pursuit phase, Vokes and Hoffmeister organized combined-operations under the adaptive task force command structure. Three things were apparent after the campaign, however. First, infantry and tank tactics were still in a state of transition, as they were unable to remain integrated when the infantry were pinned down and communications were lost. Secondly, German defences, more-so than terrain and frontage, should dictate whether or not to employ task forces. Thirdly, that task forces left brigade headquarters unable to pinpoint trouble areas as they arose to maintain the speed of the attack. The concept of task forces was then shelved, and in the Canadians' next major assault against the Gothic Line, task forces were not employed. The ability to recognize the limitations of an attack formation and re-think the pursuit phase represented a well-developed commitment to learning and applying the lessons of war. Task forces were adept at chasing German 'fighting retreats', but unsatisfactory in the larger aim of excelling through the Germans' rear and breaking their will to fight after a strong defensive line had been broken.

Notes

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- 2 John English, *The Canadian Army and the Normandy Campaign: A Study of Failure in High Command*, (New York: Praeger, 1991), 113.
- 3 Terry Copp, *Fields of Fire: The Canadians in Normandy* (Toronto: University of Toronto Press, 2003), 273.
- 4 Bill McAndrew, "Fire or Movement?: Canadian Tactical Doctrine, Sicily – 1943," *Military Affairs* 51:3 (July 1987): 144.
- 5 LAC, RG 24, Vol. 15,156. WD Princess Patricia's Canadian Light Infantry, "Princess Patricia's Canadian Light Infantry, Italian Campaign – Leonforte," July 1943.
- 6 LAC, RG 24, Vol. 14,074, WD 2nd Canadian Infantry Brigade, "Letter from Guy Simonds to Chris Vokes," 4 August 1943.
- 7 Douglas Delaney, *The Soldiers' General: Bert Hoffmeister at War* (Vancouver: UBC Press, 2005), 66.
- 8 WD Three Rivers Regiment, "Points Raised at Study Group by OFFRS of 14 CTR and ANSWERS by Officers of 12 CTR, 17 August 1943.
- 9 On 12 January Leese wrote to his wife that, "It is so amazing after 4 years of war [to] have so many Commanders and troops inexperienced in battle... I am having a big bother with Canadian Commanders. Harry Crerar is

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- here, and he of course knows nothing of military matters in the field, but is presumably the Canadian designate of the Canadian Army in England. The only really good Commander tried out in battle is Guy Simmons [sic]. I hope very much to keep him here, but there is a bigger push to bring him home. It is a worry here, as you must have longer experienced commanders." Imperial War Museum, Private Papers of Oliver Leese, Box 2, Letter to his wife, 12 January, 1944.
- 10 Guy Simonds was 5CAD's first GOC. He took over when it first became active in Italy, and Vokes was promoted to 1st Division. In early 1944 Simonds returned to England in preparation for Operation Overlord. He was replaced briefly by E.L.M Burns, who was in turn replaced by Hoffmeister when moved to I Corps.
- 11 LAC, RG 24, Vol. 13,727, WD 1st Canadian Infantry Division, 28 February 1944.
- 12 LAC, RG 24, Vol. 13,728, WD 1st Canadian Infantry Division, 21 March 1944.
- 13 Ibid., April 1944.
- 14 LAC, RG 24, Vol. 13,728, WD 1st Canadian Infantry Division, 27 April 1944.
- 15 Ibid., "Co-operative Trg with 1 Cdn Inf Div," 30 April 1944.
- 16 LAC, RG 24, Vol. 13,796, WD 5th Canadian Armoured Division, "5 Cdn Armd Div Study Period," 8 May 1944.
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- 18 Ibid., 5 May 1944.
- 19 Ibid.
- 20 Ibid., 4 May 1944.
- 21 Ibid., "Carleton and York Training Directive No.5: Drill for Tk Inf Co-op Sqn Coy Basis," 4 May 1944.
- 22 Delaney, *The Soldiers' General*, 127.
- 23 LAC, RG 24, Vol. 13,687, WD I Canadian Corps, 1 Cdn Corps Training Instruction No. 3.
- 24 Delaney, *The Soldiers' General*, 127.
- 25 Ibid., 334.
- 26 Delaney, *The Soldiers' General*, 138.
- 27 Ibid., 136.
- 28 Ibid., 137.
- 29 W.B. Fraser. *Always a Strathcona*, (Calgary, AB: Comprint, 1976), 159.
- 30 Delaney, *The Soldiers' General*, 142.
- 31 LAC, RG 24, Vol. 18,207, WD Three Rivers Regiment, "78 Div Intelligence Summary No. 177," 24 May 1944.
- 32 Lord Strathcona's Horse Regiment Archives, The Military Museums (Calgary), P. Griffin Records/Pers. File (Biography), The Citation for P. Griffin DSO.
- 33 G.W.L. Nicholson, *The Canadians in Italy: Official History of the Canadian Army in the Second World War*, Vol. 2 (Ottawa: Queen's Printer, 1956), 417.
- 34 The Lord Strathcona's Horse Regiment Archives, The Military Museums (Calgary), P. Griffin Articles, P. Griffin Records/Pers. File (Biography), Colonel P.G. Griffin, DSO, "Italian Interlude (Fourth instalment of the Author's experiences in the Italian campaign)," 3.
- 35 The Lord Strathcona's Horse Regiment Archives, The Military Museums (Calgary), E. Perkins Records/Pers. File (Articles), Lt. E.J. Perkins, "Account of Action," The Lord Strathcona's Horse Archives, 4.
- 36 Perkins. "Account of Action", 6-7.
- 37 LAC, RG 24, Vol. 15,086, WD Irish Regiment of Canada, 21 May 1944.
- 38 Delaney. *The Soldiers' General*, 138.
- 39 NAC, RG 24, Vol. 15,086, WD Irish Regiment of Canada, 23-34 May 1944.
- 40 Ibid., 24 May 1944.
- 41 Delaney, *The Soldiers' General*, 136.

- 42 Lord Strathcona's Horse Archives, The Military Museums (Calgary), WD Lord Strathcona's Horse, 17 May 1944.
- 43 Ibid., 21 May 1944.
- 44 Perkins, "Account of Action," 2.
- 45 M.B.E. McAvity, *Lord Strathcona's Horse (Royal Canadians): A Record of Achievement*, (Toronto: Brigdens Limited, 1947), 69.
- 46 Griffin, "Italian Interlude," 3.
- 47 LAC, RG 24, Vol. 15,050, WD Carleton and York Regiment, 24 May 1944.
- 48 Quoted in Mark Zuehlke, *The Liri Valley: Canada's World War II Breakthrough to Rome* (Vancouver: Douglas & McIntyre, 2003), 336.
- 49 LAC, RG 24, Vol. 15,050, WD Carleton and York Regiment, 24 May 1944.
- 50 Ibid.
- 51 Kurbis account told in Zuehlke. *The Liri Valley*, 332.
- 52 Ibid., 338-9.
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- 57 LAC, RG 24, Vol. 13,687, WD I Canadian Corps, "Memorandum on Trg Conference Held at HQ 1 Cdn Corps," 16 June 1944.
- 58 Ibid.
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- 60 LAC, RG 24, Vol. 13,687, WD I Canadian Corps, "1 Cdn Corps Training Instruction No. 4," 18 June 1944.
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Weighty and Hefty Responsibilities: Junior Canadian Army Officers, Leadership and the Second World War

Craig Leslie Mantle

In the British tradition the only occasion upon which a junior officer may release himself from the obligation of thinking of his men and his task is when he is on leave.¹

It is always necessary to prove your worth to hold the King's Commission, to be willingly accepted by men as worthy to be their leader.²

Irrespective of whether leaders are ultimately born or made, Canada's army prior to and during the Second World War employed various means – official publications, formal lectures, professional journals, special addresses – to instruct junior officers on that most essential of all military requirements, leadership, or in the parlance of the day, man management. Holders of the King's commission were expected to gain the full confidence and absolute respect of the men under their command such that all would perform effectively and efficiently, whether in battle or not. The army assumed that if followers believed in and possessed esteem for their leaders, the former would more willingly obey so as not to disappoint the latter who had done, were doing, and would come to do, so much for them. The “trick” for officers, therefore, was to secure their men's faith in their position as their legitimate and rightful leader. This chapter discusses how that was accomplished.

Whether in Canada, England or an active theatre of operations, the Canadian Army expected junior officers to acquire the cheerful, willing obedience of their subordinates by: a) adopting a “style” of leadership that can best be described as paternalistic, wherein the varied interests of their men were put before all else; b) demonstrating competence appropriate to their rank and trade; and c) conducting themselves according to the highest moral principles. Officers' responsibilities did not end there however, being enjoined as they were to train their subordinates and keep them in both good discipline and high spirits.³ Taken together, all of this was “...the

classic technique of 'man management' as taught to officers, the approved method of securing the 'willing compliance' necessary to make soldiers risk their lives...."⁴

Limitations and Purpose

Much can be learned through a brief survey of the literature as it pertains to the "type" of junior officer the Canadian Army desired.⁵ The majority of the material consulted for the purposes of this work was written for those officers that occupied the lower end of the spectrum, that is to say, cadets and lieutenants, who, theoretically, had the most to learn about leadership. As a consequence, the focus of this chapter ultimately rests on junior officers exclusively, with the treatment of more highly-ranked officers and issues of "higher command" having to wait for a separate venue. As well, little mention is made herein of the manner in which the army actually produced paternalistic, technically competent and virtuous officers; training is not the focus *per se*. The present discussion deals primarily with the ends of leadership instruction (the principles by which the ideal officer was to live, the ultimate goal) rather than the means (the process by which the ideal officer was gradually developed - the how).

Without doubt, an investigation of the processes by which reciprocal relationships – an enthusiastic obedience in return for competent leadership – could initially be cultivated and then sustained over time lays bare some of the assumptions held by the army as concerns officer-man relations and the dynamics by which inter-personal affairs could be actuated.⁶ Assessing the type of leadership the Canadian Army desired of its junior officers in both the post-First World War and Second World War eras, moreover, provides partial insight into Canada's military culture of the early- to mid-20th century. As well, analyzing the content of various materials relating to leadership, whatever their individual form, contributes to an understanding of how the army viewed its junior officers in terms of their overall responsibilities, but especially their obligations towards those over whom they exercised command. And finally, such an approach facilitates the establishment of a standard baseline as concerns inter-rank relationships, or in other words, the elucidation of the *ideal* or *archetype* to which all were encouraged to aspire.

Means of Instruction

Throughout the interwar and wartime periods, young Canadian officers (or cadets soon to be) were exposed to a variety of publications that expressed individual opinion on matters of leadership. Whether authors wrote in an

official or unofficial capacity, aspiring leaders witnessed a remarkably consistent set of ideas concerning the best means to interact with subordinates; particular details may have differed, but general concepts remained largely the same. Interestingly, not all material was of Canadian origin either. To populate its professional military journals, such as the *Canadian Defence Quarterly* (CDQ) published between 1923 and 1939, and the *Canadian Army Training Memorandum* (CATM) issued monthly between 1941 and 1947, Canada borrowed heavily from the United Kingdom and its imperial possessions, the United States, and even Germany.⁷ Journals from which material specific to leadership was taken included, amongst a handful of others, *Defence* (UK), *Field Artillery Journal* (US), *Infantry Journal* (US), *Journal of the Royal Artillery* (UK), *Military Review* (US), and various *Army Training Memoranda* from both Australia and India. Regardless of provenance, material gleaned from other publications and reprinted in either CDQ or CATM had the potential to influence readers simply through its presence. While the direct impact of CDQ on leadership during the Second World War was probably minimal owing to its supersession by other more focused and widely available publications – pre-war officers would have benefitted to a degree, but probably not those joining after hostilities had commenced – the CATM was in a much greater position to effect good leadership given its frequency of publication, easily accessible content and broad distribution. The CATM fulfilled a seminal role.

Canada's army at the outbreak of war was by any measure tiny, the victim of continual budgetary reductions in the immediate post-First World War era and throughout the Depression that followed. Government apathy during the 1920s and 1930s, compounded by a war-weary and disinterested public, all but ensured that the army was under-funded, under-equipped, under-trained and under-manned upon the declaration of war in September 1939. Canada's contribution, originally pegged at but a single division, had by 1942 grown to an entire army (First) comprised of two corps (I and II) and all the support that that entailed. When the war was over, the army's "total intake" numbered more than 730,000 persons,⁸ enlistments in the Canadian military *in toto* (navy, army and air force) numbered an impressive one million from a population only eleven times that size.⁹ Perhaps the most important statistic, at least for present purposes, some 42,613 commissions had been granted to aspiring leaders between 1939 and 1946.¹⁰

With so many new officers, the CATM (and allied publications) provided one avenue through which a quick introduction to leadership could be obtained. Being required reading for every holder of the King's commission – "Every officer in the Canadian Army in Canada should receive a copy"¹¹ – this

monthly tract offered short and pithy articles that introduced officers to the expectations of proper and acceptable conduct as concerned their interactions with subordinates. In essence, successive numbers of the *CATM* endeavoured to highlight the more salient aspects of officer-man relations and to give officers a solid grounding in how to elicit the best from their men. That being said, the *CATM* was also the Canadian Army's professional journal of the day and did not limit itself solely to discussions of leadership, although articles dealing with man management were indeed a frequent occurrence. Commentaries on techniques of instruction and enemy weapons, for instance, gave further practical advice to young officers attempting to master every angle of their new profession, while contemporary operational narratives from campaigns throughout the world kept the fare interesting and varied.

If these two Canadian journals – *CDQ* and *CATM* – impacted Canadian officers, so too did British publications that dealt with leadership in one way or another. Since Canada generally followed Great Britain's lead in matters military, War Office documents frequently appeared under separate Canadian cover. In some instances, in the interest of economy and efficiency no doubt, Canadian authorities simply re-issued a British publication, the only modification being a short notice affixed to the inside cover that pointed readers to the most relevant and pertinent sections. One pamphlet in particular "has been approved for use in the British Army but much of it is applicable to the Canadian Army."¹²

As an aside, some of the various Canadian and British publications directed towards officers in the hopes of making them better leaders at times appear (at least from a modern Canadian perspective of some 70 years on) somewhat presumptuous, even condescending. No doubt ghost-written by officers, perhaps very well placed and educated officers, many pamphlets spoke *for* and from the perspective *of* the common soldier, stating for instance what he does and does not like, how he will act when faced with a particular situation, what his beliefs are, how profoundly his emotions vary, what are his preferences in terms of drink, and so forth. The "soldier" as portrayed in many training documents comes across as a touch simple, somewhat naïve and just waiting for leadership (exercised by an 18-, 19- or 20-year old no less!), or in other words, as a foregone conclusion. When talking to their soldiers, for instance, officers were cautioned to "Speak shortly and to the point. Use plain words of one or two syllables. ... Avoid eloquence as a rule." At other times, they were to "Write letters for the men, as their education rarely fits them to conduct official correspondence."¹³ The consistency of human nature undoubtedly ensured that some pieces of advice were sound

and broadly applicable – who wouldn't like a hot meal, a warm bath and a comfortable bed at the end of a hard day's work? – yet some pamphlets conveyed the impression that officers would only have to lead simple-minded soldiers possessed of a few basic needs. If those needs were met, so the argument ran, leaders would find themselves in command of loyal, dedicated, respectful and highly obedient followers. In a rapidly expanding army, such an approach was perhaps inevitable, in which the soldier was reduced to the lowest common denominator and proffered advice was non-descript and simple. The need to train officers quickly apparently necessitated that advice be generic and not overly complex; an officer would have to deal with those soldiers on an individual basis who did not fit the mould conveyed through his training materials.

Within the *CATM* in particular, and other training documents more generally, the assumption that officers could be made and that leadership could be taught was indeed omnipresent. New officers had much to learn; limited training days passed all too quickly and were filled with a variety of diverse subjects. Leadership or man management, important as it was, could only receive a fixed amount of attention. Officers were therefore required, indeed expected, to study independently,¹⁴ and a host of publications appeared throughout the war to facilitate their learning.

An examination of training syllabi nicely illustrates the demands placed upon nascent officers. At the Brockville Officer Training Centre, for instance, Lieutenant-Colonel R.G. Whitelaw, a Permanent Force officer from The Royal Canadian Regiment who had served on the pre-war General Staff, kept his students busy: traditional military pursuits were important, with drill, marching and map reading each taking up 20 out of over 200 training periods; field engineering consumed 15; organization and administration, mechanical transport (cadets learned how to ride a motorcycle and drive a Bren gun carrier), gas protection, and rifle drill each accounted for 12; and bayonet fighting occupied another eight. In contrast, just four training periods in 1941 were devoted to the twin topics of leadership and morale, one of which dealt with the "Customs of the Service and Mess Conduct," while another focussed on the "Duties of a Platoon or Equivalent Commander in Barracks & Camp."¹⁵ Officers who passed through Brockville no doubt recalled little from these two instructional periods as they led their soldiers in battle against an aggressive, determined and mechanized enemy.

Such a wide variation in emphasis at an establishment designed to turn civilians into competent wartime leaders not surprisingly aroused participant comment. George Blackburn, for instance, later recounted that his days

at Brockville were concerned too much with drill and too little with leadership.¹⁶ Wilfred Smith, on the other hand, held an entirely different opinion, offering that the heavy focus on the technical as opposed to the personal served a distinct and beneficial purpose:

...this knowledge and ability in infantry skills were particularly important in the Canadian Army, where egalitarian principles were so firmly entrenched that officers received little automatic respect by virtue of their rank alone. Respect was accorded when officers were considered to deserve it on the basis of knowledge, performance, and leadership.¹⁷

In the eyes of this officer at least, technical competence was just as important as the ability to foster sound interpersonal relations. Few men would follow a leader, no matter how friendly and personable, who could not fire his pistol, read his map or deploy his soldiers properly.

To further instruct on the topic of leadership, the spoken word frequently supplemented the written. On special occasions where large numbers of impressionable young officers were present, both civilian and military dignitaries frequently offered their opinion on how best leadership could be effected. Whether the minister of national defence, the commandant of a training school (like Whitelaw above) or a distinguished soldier sporting rows of ribbons, various speakers all made an effort to imbue their listeners with a sense of the profound, namely that they would soon be in a position of great responsibility in which only competent leadership would truly suffice. The comments of each individual varied of course, as did their quality and brevity, but each address, in its own way, strove to motivate and to reinforce the concepts to which the young listeners had already been, or would soon be, exposed. Although doubtless of the same value as publications given their infrequency and transient nature, special addresses not only bolstered the importance of certain leadership concepts, but also made more than clear what senior officers expected of subordinates. Upon taking command at Brockville in June 1942, for example, Milton Fowler Gregg, V.C., of First World War fame, addressed a new class of cadets. His comments were such that one observer favourably remarked:

Quietly, without rant or histrionics, [Gregg] brought home to the men their responsibility and duty; that which they owe their country, their superior, the men they would lead and, above all,

their responsibility to democracy and civilization. His talk was stirring, a dare and a challenge. A challenge that all men passing through Brockville must accept. The junior leaders of the Canadian Army owe an incalculable debt to Colonel Gregg, not only for his conscious fine work but for the type of leadership which he exemplifies on which so many unconsciously model themselves.¹⁸

Canadian officers were therefore inundated from various quarters with advice and suggestions concerning leadership, truly a wealth of information from which lessons could be absorbed and potentially employed.¹⁹ All in all, the various publications and addresses to which aspiring officers were exposed contended that leadership was very much a function of human relations ... obviously and naturally! Each in their own way, however, such discussions offered insight into the fundamentals of this relationship and suggested means by which its dynamics could be influenced. The material presented in lectures and published articles took a number of different forms. By and large, the majority of discussions proffered advice and suggestions, generally instructing young officers as to what actions they should take, and by extension, what actions they should avoid. Much of this dialogue offered a “checklist” of sorts that would ensure success, so it was assumed, if aggressively pursued.²⁰ Officers were expected to possess very specific qualities – magnanimity, gregariousness, a sense of honour, justice and fair play – and the instructions that they received would help bring these qualities to the fore. Second, discourses on leadership also informed officers in no uncertain terms what their men expected of them. Knowing what subordinates desired of superiors encouraged the latter to interact with the former in a very deliberate and particular manner so as to meet these sundry requirements.²¹ And finally, some material attempted to explain the psychology of the soldier. By understanding soldiers’ motivations and their anticipated behaviour, officers could theoretically impose themselves on these thought processes to greatest effect. Appreciating how subordinates thought, again so the assumption ran, would make it easier for a leader to influence and encourage certain behaviours.²² Whether deliberate or not, these three “types” of material, that provided advice, explained expectations and explored psychology, allowed officers to see the complex issue of leadership from multiple angles and different perspectives, all of which would hopefully aid in their understanding.

So what specifically did the Canadian Army encourage in regards to leadership in order to cultivate and maintain strong officer-man relations?

What type of officer was desired? How were officers expected to interact with their men? It is not intended here to simply list every action that an officer could take to gain the confidence and respect, and thus the willing compliance, of his soldiers, as the resulting list could theoretically have no end and would ultimately serve very little purpose; the same can also be said of subordinates' expectations of superiors. Individual pamphlets and special addresses serve those purposes all too well. Rather, the main themes of the literature will be identified and briefly discussed in order to understand in broad terms what the Canadian Army viewed as the pre-requisites for good, effective leadership. Better it is not to give undue importance to details while overlooking essentials. Whatever their individual nature, particular actions ultimately flowed from these general principles, and so it is of greater utility to place more emphasis on the latter than the former. As will be seen, the type of officer that the army desired was one that: a) cared for his men in every respect; b) was competent in the execution of his duties; and c) upheld a high moral standard. If such was achieved, he, and the army in turn, would be well on their way to success.

Paternalism in Theory

In essence, both prior to and throughout the Second World War, the Canadian Army encouraged leaders to adopt a paternalistic attitude toward subordinates in the hopes of ultimately enmeshing all in a close, sympathetic relationship. The concept of paternalism was certainly not unknown, for as other historians such as Gary Sheffield, Helen McCartney, David Englander, Richard Holmes and John Baynes have all illustrated, it mediated officer-man relationships during the Great War.²³ In a corpus of work dealing with the manner in which subordinate and superior interacted with one another, these authors have discussed the paternalistic exchange in the context of the British Expeditionary Force between 1914 and 1919, taking into account in the process such complicating factors as class, type of unit (Regular, Territorial or New Army) and pre-war social influences, amongst others. Quite simply, and very briefly, the non-commissioned offered loyalty and deference to the commissioned in return for competent leadership, both behind the lines and especially in battle, and a high degree of care, wherein superiors looked out for the interests and welfare of subordinates. *Noblesse oblige* stood as paternalism's credo in that privilege entailed responsibility. Benefitting from more comfortable and favourable conditions of service, those befitting a gentleman, officers were to play the role of father figure, gain an understanding of and sympathy with their men, show concern for their lives, and

see to their needs before their own, whatever they may be.²⁴ If such was the case, if an officer was at the same time paternal and competent, his soldiers would theoretically follow him with more enthusiasm and vim than another officer who was less so on either account ... or both. A paternalistic style of leadership was certainly in evidence in the British Army of the First World War and was probably present in the Canadian Expeditionary Force too; at present, the underdeveloped state of the literature on this point specifically prevents the drawing of any firm conclusions, however it seems likely, based on preliminary investigations, that such was indeed the case.²⁵ If paternalism was present in Canada's army of the Great War, as it most surely was in one form or another, then it should come as no surprise that such a style was in evidence during the Second World War also.

Paternalism in Practice

Such an approach, in which officers ensured that the basic physical and psychological needs of their men were met, was intended neither to be indulgent, nor pampering. Actions along paternalistic lines were meant to encourage loyalty, trust, confidence and respect, all of which would hopefully translate into obedience at the crucial moment. Paternalism was very much intended to create the type of relationship, based on strong bonds of mutual affection, in which quick obedience was freely given in recognition of, and return for, good treatment. The army itself acknowledged during the Second World War that paternalism served a very utilitarian, even selfish, purpose, and did not aim to make subordinates happy just for happiness sake. "The main object of welfare," so one pamphlet made explicitly clear, "is to keep the men as happy and contented as possible, so that they may be at all times fighting fit and fit to fight."²⁶ One *CATM* article further observed:

Besides the duty we owe in looking after them, it [paternalistic leadership] forms the basis of discipline. It ensures the ready response for the extra bit of effort when required. If men remember the times you have gone out of your way to help them, and that you always put their interests before your own, you have made them your debtors and your appeal has more authority and force, as few men like not to repay debts of this kind.²⁷

A junior officer was expected to fulfil a number of different responsibilities toward his men – advocate, provider, defender, confidant, friend and aide. Fulfilling such roles entailed the sacrifice of an officer's spare time in

the interest and service of his men.²⁸ To reinforce this notion, one wartime publication noted:

The more you ask of your men in the way of effort and resistance, the more must you see to their comfort and welfare, and a good officer will ask a lot from his men, at the same time doing a lot for them. You cannot ask without giving, and you ought to give before asking.²⁹

Seeing to their “comfort and welfare” encompassed a broad range of activities and was indeed unlimited. Anything that could be done was to be done. It included, but was not limited to, ensuring that leave was administered properly; that men ate wholesome meals with the rations on hand; that they received correspondence from and were able to write letters to their kinsfolk; that their private affairs were in order; that they had a chance to speak with their officer about any subjects of concern; that their health was maintained; that they participated in sports and games; that their sexual lives were not misguided; that they were entertained; that they had the chance to further their education; and that their religious beliefs were supported.³⁰ Officers were therefore encouraged to often ask themselves, “What little thing more can I do for my men?”³¹ In everything, and at all times, an officer was to be “for” his subordinates. In a very real sense, their troubles were his troubles. By seeing to their varied interests, he could foster the confidence and respect upon which the ideal officer-man relationship was based and ensure that his soldiers at all times remained focussed on the task at hand.³² It was for this reason that at Brockville George Blackburn and his fellow cadets “had it pounded into you by every instructor during officer’s training that the welfare of the men always comes before your own.”³³

If a junior officer was to be successful in any of his sundry roles, he first had to know his subordinates on more than a superficial level. He simply could not do his job properly if he did not know each man whom he commanded. In addition to mere vital statistics, an officer was to be familiar with the personality, intelligence, family circumstances and abilities of all of his soldiers. Personal knowledge could be gained in any number of ways,³⁴ but participation in sports was universally advocated, so much so that even adjutants, the principal staff officers of individual units, were encouraged to partake in collective physical recreation.³⁵ Only by knowing his subordinates could a superior even begin to address their difficulties or act on their behalf.³⁶

A number of dignitaries took hold of this particular theme, referring to it often during various addresses to which officer cadets were exposed (or in their opinion, no doubt, subjected!). Speaking to a class at Brockville in 1942, Lieutenant-General Ken Stuart, the Chief of the General Staff, remarked that studying and getting “to know each one of your men” was one of the real “delights of regimental soldiering.” Like any artful skill, however, it required constant and repetitious practice: “If you can strike the right note, you can get the results you wish from any individual. Your problem is to keep on playing your notes until you strike the right one.”³⁷ Minister of National Defence J.L. Ralston offered similar counsel to graduates in the fall of 1942: “set yourself to learn immediately the names of the men, where they come from and a little something at least of their background, what they did before they came into the Army, what their fathers did, something about their families and something about their ambitions.” He commented further that learning their personal details “will make you more human. It will help you get the best out of them.” The minister continued, not incorrectly:

A man who has to keep aloof from his men to maintain his [prestige] isn't the kind of stuff to make a good Canadian officer. They [the soldiers] don't want to be babied, but they have a right to expect your constant and vigilant interest in their welfare.³⁸

Such intimate knowledge better positioned an officer to assist his men when personal problems arose, thereby ensuring that they remained focussed on their immediate task, be it training or operations. A soldier simply could not concentrate on his military duties if he was constantly distracted by problems of a more personal nature.³⁹

By knowing his subordinates' feelings, moreover, an officer was better able to maintain discipline. Understanding how each man felt in general allowed issues of concern to be resolved early with ease rather than corrected later with difficulty.⁴⁰ It is for this reason that “An officer must be always readily accessible to his men, both for interviews and the hearing of complaints.”⁴¹ Officers were required to create within their respective commands a conducive environment, one that was both encouraging and facilitative, in which subordinates felt free to approach their superior: “The men must feel that they can come and talk to their officers naturally about their private difficulties, and must know that when they do so they will get sympathetic hearing.”⁴²

Furthermore, because some men needed gentle persuasion to perform, while others required forceful direction and others still required no prompt-

ing at all, knowing what “technique” worked best with each individual, knowledge that could only be gained through prolonged and meaningful contact, allowed an officer when time and opportunity allowed to tailor his words and actions in order to connect with his subordinates in a manner that resonated with them best. Indeed, “The more one knows of the men’s characters, the easier will it be to handle them.”⁴³ An officer could certainly begin the process of forging strong relationships by taking an active interest in his men and using that knowledge to greatest effect.

To further the creation of affective bonds based on mutual loyalty and respect, junior officers were encouraged to allow their men an opportunity to come to know them as individuals too. Because remaining distant and aloof would not facilitate either the creation or continuance of strong relationships, “the officer must go out of his way to know the men personally and let them get to know him and see that he is not really such a bad fellow after all.”⁴⁴ Because of the powerful bonds that were created in the process of coming to know one another, men were more likely to follow an officer with whom they had developed a friendly, yet professional, rapport. Whether owing to tradition, human nature, a pervasive military culture or something else altogether, men frequently viewed their officers with a healthy dose of suspicion and reserve, one publication going so far as to assert that some men are “terribly suspicious about the honesty of their officers.”⁴⁵ The heavy emphasis on inter-rank contact was therefore intended to break down such psychological barriers, to show the former that the latter was really on their side and was not to be feared. As one article made clear:

You must have a cheerful, unhesitating obedience of all the men under your command. This can only be obtained by knowing your men and they knowing you. Appreciate the situation of each man under your command. Show them that you are 100% for them at all times and you will get 100% co-operation at all times from them.⁴⁶

The foregoing was perhaps a little optimistic, but the underlying idea was more than sound.

Acting on behalf of their soldiers had its limits however. Officers were cautioned that in this most essential of duties, “friendliness is not to be confused with familiarity, which must always be an enemy of good discipline.”⁴⁷ A certain distance had to be maintained if appropriate respect was to exist between superior and subordinate. Practically speaking, too close a relationship

might possibly have impaired the imposition of discipline, since one's friends would have been much harder to punish than one's soldiers. Officer and man could be close acquaintances, but they certainly could not be close friends.

In order to create and maintain strong relationships that could withstand the trials and difficulties of battle, the army also encouraged superiors to respect subordinates – their person, their intelligence, their sense of fair play. Meeting the sundry psychological needs of the non-commissioned could take many forms, but interwar and wartime publications, along with various speeches and addresses, frequently emphasized the need for officers to listen, to explain, and to be just. In the army's opinion, "The soldier does not mind a severe code [of discipline] provided it is administered fairly and reasonably."⁴⁸ Members of McGill University's Canadian Officers' Training Corps were similarly instructed:

Officers, W.O.'s [Warrant Officers] and N.C.O.'s [Non-Commissioned Officers] will adopt towards subordinates such methods of command and treatment as will not only ensure respect for authority, but also foster the feelings of self-respect and personal honour essential to military efficiency. They will avoid intemperate language or an offensive manner.⁴⁹

By treating soldiers as individuals and with a modicum of respect, rather than as mere automatons at the complete disposal of the army, as a resource as it were, officers could further encourage the loyalty and confidence so essential to effective officer-man relations. All in positions of authority were frequently enjoined to "regard and treat ... subordinates with the courtesy and respect which is peculiarly due to every person who cannot defend himself against discourtesy and disrespect."⁵⁰

With the full force of military law behind them, officers could theoretically expect their men to instantaneously obey their orders without question. Yet, the army realized (and so too did the best officers it would seem) that a more willing obedience would result if leaders took the time to explain to their followers the reasons behind particular courses of action, again if feasible. Although not obligated to do so, the benefits in performance that oftentimes resulted encouraged such an approach. As Lieutenant-General G.G. Simonds, General Officer Commanding II Canadian Corps, saw it, "If you explain to the Canadian soldier what is required of him and give him a good reason for it he will produce the goods every single time and do it twice as well as any other individual."⁵¹ Again, perhaps a little optimistic, but the idea resonates. Letting

the men know how they fit into the overall plan was equally motivating. Simonds likewise believed that "Officers must keep their troops in the picture at all times. The Canadian soldier does not give his best when he is not in the picture."⁵² Explanations along these lines also ensured that soldiers knew enough of the overall plan to improvise and to rely on their own individual initiative to achieve the objective if circumstances demanded.⁵³

Rather than treat soldiers as mere instruments of war, officers were encouraged to regard their men as members of a larger team, a team to which in reality they all belonged. As one lecturer instructed:

I don't want you to go away, however, with the idea that the men must be treated like dogs – very far from it. You don't want to curse or damn every time you notice things go wrong. Sometimes a word of encouragement, or a patient listening to an explanation, or a smile when pointing out the fault will go a long way. Remember that, though we are officers and the men are privates, still we are all comrades in the great dangers and the great struggle; make the men feel that you realize this comradeship *and love it.*⁵⁴

Or in other words:

Ours is a force of men who have voluntarily offered themselves to serve their country in the cause of democracy, and it will do discipline no harm if officers and N.C.O.'s recognize that men of all ranks are fellow-workers in a common cause, to be treated with the respect which one man owes to another in a free country.⁵⁵

Like other leadership practices, respecting one's subordinates could encompass a multitude of different actions. All in all, however, the army recognized that an officer who acknowledged his men's intelligence, abilities, role, insights, and so on, could increase the strength of attachment between them. A relationship based on such respect, so the army contended, would be more robust than one in which it was lacking. A "know-it-all" leader who remained aloof, who treated his subordinates with contempt and who demanded implicit obedience would surely be less successful than his *confrere* who was the exact opposite in every possible respect.

That paternalism was central to the officer-man relationship is beyond doubt. A young officer had to concern himself less with his own individ-

ual approach to leadership, that is to say, what form his minute interactions with his men would ultimately take, and more with the fact that he was now obligated by virtue of his commission to look out for his subordinates on every account. One Canadian pamphlet that received wide distribution (and was apparently adopted by both British and American forces) asserted that a platoon commander “needs to feel, and must show, interest and concern in *everything* that affects the welfare and comfort of each man.” It continued, “The backbone of good morale remains discipline, but that discipline needs first to be self-discipline. The platoon officer must be able to count on himself to put all platoon values ahead of his own selfish interests.”⁵⁶ An officer’s particular approach might change from day to day, and from circumstance to circumstance, but the ideal of paternalism remained inviolate and sacrosanct. The regimental historian of Toronto’s famed 48th Highlanders of Canada articulately expressed this notion a decade after war’s end, writing as he did:

It was not that the young subaltern had to decide whether a tough, a superior, a conciliatory or a first-name basis was best with the men: he had given some thought to that . . . and could adjust to that. The dismaying change was that everything about each of his men was now his business, whether he was on or off parade, doing fatigue or gone AWL [Absent Without Leave], drunk or sober, and not excluding the condition of his callouses, what to do about his own or his wife’s infidelities, and how much rent a soldier’s family should pay. The young officer had most to learn about the army way. He had to know the thinking of both the men and the N.C.Os., and also the attitude of those up above. Not the least thing he must learn was how to stand diplomatically if need be between his men and the top; when they were wrong he would nearly always take the blame. . . . In a time that was still afar, when officers and men shared the same hazards and hardships [i.e., battle], he would see why this intimate knowledge of his men was wise. It would help him know what to expect, or could demand from his men.⁵⁷

Competence

Being “for” his subordinates, however manifested in practice, did not automatically fit an officer for the weighty responsibilities of command and

leadership, especially in battle. An incompetent paternal officer could be a dangerous liability just the same as a bungling martinet. While a paternalistic and respectful disposition certainly aided in securing a cheerful obedience, such an approach was but one component of a much larger and more complex equation. If an officer was to be a leader in the truest and most accurate sense of the term, he had to know his job well. By demonstrating proficiency in all matters commensurate with his rank and trade, whether administrative, supportive or tactical, an officer could likewise gain the confidence, respect and trust of his men. As one publication made clear, "You must know your job. If you do not you can have no confidence in yourself, and the men can, and will, have no confidence in you either."⁵⁸ In a sense, competence was merely an extension of paternalism. If an officer was to care for his subordinates in every respect and attend to their interests, he had to be able to lead them effectively in battle (from the front, it might be added)⁵⁹ and ensure that their lives were not needlessly wasted through incompetence or indifference. For non-combatant officers, on the other hand, a high level of personal competence would ensure that their men's time and effort were not ill-placed. As such, the commissioned were constantly reminded:

Your men must instinctively look to you. To achieve this end, you must earn their respect, for your knowledge, for your assumption of responsibility, and for your decisiveness of action. If you know what you are doing, your self-confidence will inspire the confidence and respect of your men and be mirrored in their actions.⁶⁰

An officer who was competent and who displayed a genuine interest in his men – two hallmarks of effective junior leadership – was no doubt easy to follow.

Personal Conduct

The army also believed, however, that irreproachable personal conduct would further assist officers in gaining the respect, and thus the willing obedience, of their men.⁶¹ An immaculately turned-out and natty subaltern was supposed to serve the very same purpose, as one training document made clear: "To be extremely smart and alert should be the ambition of every CAC [Canadian Armoured Corps] officer."⁶² Being the embodiment of the military ethos, officers were expected to set the example for all to emulate in order that the sundry components of that ethos – a distinct and proper

military bearing, aggressiveness, a corporate spirit, trustworthiness, and so on – might be transmitted to and absorbed by the soldiers whom they commanded. A superior could not (from a moral perspective at least) demand that his subordinates exemplify the military spirit when he himself was not a true and genuine exemplar of that spirit in turn. An officer was very much expected to lead through positive example. It was for this reason that Colonel G. Brock Chisholm observed:

Everything the platoon officer does or says is discussed. His behaviour on and off parade, in mess, out for the evening, on leave, is reported fully and critically. He is presenting a picture of a soldier to his men. If they can find any defects in his character they will do so, as an excuse for not giving up their own former points of view in favour of his [that is, for adopting the military perspective as their own]. The officer is being judged as worthy of acceptance or not, all the time, 24 hours a day. His behaviour and bearing are determining what kind of soldiers these men will be.⁶³

Soldiers in the field held similar views as the erudite colonel. Officers were supposed to be paragons of virtue who were expected never to cross certain behavioural boundaries. Some “things,” as many found out to their eventual detriment, were simply “not done” and were definitely “not on.” Earning the respect of their soldiers was predicated on officers acting in such a manner as to indicate that they *actually deserved* their men’s respect; whatever its individual nature, improper conduct encouraged a certain level of disdain and made it that much harder for subordinates to willingly offer that respect upon which effective officer-man relations were ideally predicated. George Blackburn recalls that one officer...

whose stock-in-trade is dirty jokes, within days after the arrival at the Battery became an object of contempt for many in his troop. On making discreet inquiries, you were told it wasn’t that they were put off by the subject matter of the jokes, but rather that their officer would indulge in telling them. They simply expected a man whom they were obliged to salute, and whose orders they had to carry out without question, to be a cut above the average, with an advanced sense of decency and morality.⁶⁴

The Way Forward and Final Thoughts

As is undoubtedly clear, the above analysis of various publications and addresses that focus on leadership presents the *ideal*, the type of leader that the army hoped every junior officer would aspire to be and eventually become with time, study and practice. Not only was an officer to be highly competent in the execution of his specific duties and the embodiment of all that was virtuous, but he also was to be paternal towards his subordinates, acting almost as a surrogate father. But where does one go from here? As it turns out, the potential paths are many indeed.

With the establishment of the ideal, historians may subsequently opt to “measure,” to compare, individual officers against this standard, this very high standard, to determine if in fact the concepts expounded upon through diverse avenues were actually implemented and became more than just plain theory. All in all, some officers seem to have approached the archetype to a remarkable degree,⁶⁵ yet others most certainly did not and fell far short on many counts.⁶⁶ Why did some junior officers fail to approach this ideal? Were the reasons systemic, personal or environmental? Why, to the contrary, did others succeed?

Moreover, while the theoretical steps to proficient officership seem relatively simple and straightforward, even logical at times, actually applying them was undoubtedly much more difficult, especially in situations where lives and the outcome of individual operations hung precariously in the balance. Much about the complexities and requirements of leadership could certainly be learned through training pamphlets, lectures and the odd address, offering as they did, when taken together, considerable insight into one of the most challenging responsibilities that officers would ever have to assume. Such an introduction must have been enlightening, especially for those who never had had the opportunity to “lead” their fellow citizens in one respect or another prior to joining the army. Individuals who came from business, church groups, large families or other social organizations undoubtedly possessed an advantage – some leadership principles apply in all circumstances, regardless⁶⁷ – yet even they too had much to learn and come to grips with. At the end of their training, officers may have possessed the theory behind good leadership, but only when placed in command could their theoretical understanding be put into practice, elements of which were undoubtedly modified, invented anew or discarded altogether. Theory and praxis are rarely congruent. David Borys’ insightful examination of Civil Affairs operations during the latter stages of the war, also included in this volume, certainly lends credence to such an assertion; officers who fulfilled

this vital function may have taken an instructional course, but it seems that they truly learned through practice and experience in the field, faced as they were with real-life challenges that a training course in Canada or England would have a hard time replicating with any sense of realism or moment. And so, from this perspective, historians might be inclined to inquire whether or not the various means of instruction *actually had the desired effect* of turning raw civilians with no or limited military experience into competent officers who could lead their soldiers under extraordinarily difficult circumstances.

Furthermore, the individual means by which leadership principles were communicated – whether in the form of publications of various sorts or addresses by distinguished personalities – were infused with a host of assumptions that, when fully explored, will surely provide insight into the social dynamic of the Second World War-era and some of the salient features of Canadian military culture at the time. Assessing the impact of these assumptions would surely be a profitable exercise also. As has been suggested above, the *CDQ*, the *CATM* and other training pamphlets relied heavily on self-development and passive absorption; officers received these publications and were expected to read, digest and later implement its contents as appropriate. George Blackburn, for instance, observed that unless junior officers had attended the Royal Military College of Canada in Kingston, they “gained their knowledge in a hit-and-miss fashion – as much from their own initiative in studying pamphlets issued by the British War Office as from the loosely structured courses set up by their units.”⁶⁸ No wonder then that when faced with the imminent prospect of letting down his regiment in an upcoming exercise, Bert Hoffmeister, from the Seaforth Highlanders of Canada, purchased War Office pamphlets in Aldershot, England and taught himself how to write an operation order, so frustrated (and not a little anxious) was he by his own lack of training.⁶⁹ With the requirement to quickly train officers to meet the needs of a much-expanded force that after June 1944 in the case of Northern Europe and July 1943 in the case of Sicily and Italy was engaged in high intensity combat operations, such an approach was perhaps inevitable, yet what were the consequences? Were junior officers trained too quickly or incompletely? Was too much left to their own devices? Did the quality of leadership at the platoon-level suffer as a result, and if so, how and to what extent? Where did subalterns actually learn leadership, during operations against a determined enemy or during preparations for the same? Again referring to Borys, it would seem that much was learned “on the fly” when, of course, the consequences of failure were at their highest.

Other questions that historians might possibly ask are numerous indeed and can certainly not all be listed here. What, for instance, one might additionally inquire, was the impact of the First World War, veteran non-commissioned and commissioned officers (who oftentimes served as instructors), a more egalitarian society, and so on, on officer-man relations then in evidence during the 1939-1945 war? Along similar lines, how effective were various training establishments (like Brockville where Whitelaw and Gregg commanded) in producing competent leaders? Difficult, complex and involved questions to be sure, but all questions that must be asked and answered in order to arrive at a complete and comprehensive understanding of junior leadership in Canada's army during the "second Great War." Again, what has been described above is merely the ideal, the archetype, to which all were encouraged to aspire, one very small piece of a very large puzzle.

And so, in the end, the Canadian Army during the interwar period, and especially during the Second World War itself, encouraged young officers to be paternalistic in their relationships, competent in their actions and upright in their deportment. Success in each undertaking was intended to secure the confidence, respect and loyalty of subordinates, all of which it was hoped would encourage a more willing, indeed enthusiastic, obedience. One publication summarized the whole matter succinctly, "Leadership of the highest order is required of every officer."⁷⁰ Stated differently, but with no less significance:

Never forget for a minute that the men in the ranks are the salt of the earth, that they deserve the best possible leadership, and that it is your privilege, as well as your great responsibility, to have the honour of commanding them. Every officer must try his utmost to be worthy of that honour and responsibility.⁷¹

That responsibility for the "best possible leadership" was immense, composed as it was of multiple facets that the young leader had to master. Because soldiers were unlikely to follow with any enthusiasm those leaders who treated them poorly, did not know their job sufficiently or failed to act in a manner that encouraged respect – they would follow because they had to, not because they wanted to – the army's heavy emphasis on paternalism, competence and rectitude was very much intended to improve the officer-man relationship to the point where obedience was freely given in exchange for, and out of acknowledgment of, sound treatment. By seeing to their various responsibilities, junior officers were to be more than just an "ornamental

appendage⁷² within their individual units. The best, it seems fair to suggest, were fatherly *and* able *and* virtuous. Effective leadership ultimately required constant attention and effort: relationships had to be continually fostered, skills had to be continually improved, and one's conduct had to be continually monitored. Weighty and hefty responsibilities indeed!

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Notes

- 1 "Knowing Your Job," *Canadian Army Training Memorandum [CATM]*, 1941 Digest, 5.
- 2 "Notes for Young Officers on Leadership," *CATM*, no. 13 (April 1942), 22.
- 3 Numerous discussions concerning the association between leadership and discipline, and leadership and morale, and how in both cases specific actions can have either positive or negative impacts, are to be found in the published literature and certain archival collections. See, for instance, Flight-Lieutenant F.V. Heakes, "Discipline," *Canadian Defence Quarterly [CDQ]* 11, no. 3 (April 1934), 337-345; Squadron Leader A.A.L. Cuffe, "Leadership and Morale," *CDQ* 7, no. 3 (April 1930), 359-364; Captain M.F. Macintosh, "Morale," *CDQ* 5, no. 3 (April 1928), 325-328; Wing Commander S.G. Tackaberry, "Leadership and Morale," *CDQ* 15, no. 2 (January 1938), 170-177; Great Britain, British Army of the Rhine, *Morale in Battle: Analysis* (Germany, 1946; Canadian Reprint, 1947), and, University of Victoria, Special Collections, Walter Bapty, SC008, "Discipline and Leadership," 5 June 1941. The importance of training and officers' responsibilities with respect to the same can be found in official publications on training such as Great Britain, War Office, *Training and Manoeuvre Regulations* (1923), and, Great Britain, War Office, *The Officer and His Job: Morale and Fighting Efficiency* (1940). Neither training nor the maintenance of discipline / morale will be discussed in this chapter however. The former is a separate subject unto itself and thus deserves individual treatment, while the latter, it could be argued, falls under leadership in that it would be present when exceptional leadership prevailed.
- 4 J.L. Granatstein, "Hoffmeister in Italy," *Canadian Military History* 2, no. 2 (1993), 58. See also, J.L. Granatstein, *The Generals: The Canadian Army's Senior Commanders in the Second World War* (Toronto: Stoddart, 1993), 194.

- 5 As can be seen, the “literature” employed for present purposes consists primarily of published materials. To allay any fears to the contrary, such writings were actually used in the training of officers. Thus, the discussion that follows is not simply related to an ethereal literature, a literature that existed but was not used, but rather to a functional literature, a literature that was incorporated into training syllabi and had the potential to influence by virtue of its inclusion. As evidence, see *Library and Archives Canada* [LAC], Record Group [RG] 24, Vol. 9823, CMHQ, 2/OFFRS TRG/1, Draft “E” Group Training Directive – Officers Training, 15 July 1943, where it is stated that officers will be examined on the contents of many of the individual pamphlets cited herein.
- 6 When reciprocal relationships failed, that is, when individuals in positions of authority offered improper leadership, disobedience sometimes resulted. Such a theme is evident in Craig Leslie Mantle, ed., *The Apathetic and the Defiant: Case Studies of Canadian Mutiny and Disobedience, 1812 to 1919* (Toronto: CDA Press / Dundurn, 2007); Howard G. Coombs, ed., *The Insubordinate and the Noncompliant: Case Studies of Canadian Mutiny and Disobedience, 1920 to Present* (Toronto: CDA Press / Dundurn, 2007); and to a lesser extent in Craig Leslie Mantle, ed., *The Unwilling and The Reluctant: Theoretical Perspectives on Disobedience in the Military* (Kingston: CDA Press, 2006).
- 7 For instance, one issue of the *CATM* included a translated and condensed excerpt “from a book written by a Company Commander in the German Army which can be read with profit by all officers of the Canadian Army.” See *CATM*, no.10 (January 1942), 11 and 39-48.
- 8 C.P. Stacey, *The Canadian Army – 1939-1945 – An Official Historical Summary* (Ottawa: King’s Printer, 1948), 308-309.
- 9 Ibid.
- 10 C.P. Stacey, *Official History of the Canadian Army in the Second World War – Volume 1 – Six Years of War – The Army in Canada, Britain and The Pacific* (Ottawa: Queen’s Printer, 1955), 131.
- 11 Notice printed below Table of Contents, *CATM*, no. 23 (February 1943), 2; only one of many possible *CATM* issues that could have been cited in support.
- 12 See Great Britain, War Office, *The Soldier’s Welfare: Notes for Officers* (1941) held at the Canadian War Museum, Ottawa, Ontario.
- 13 Ibid., 10 and 9, respectively. To be fair, *The Soldier’s Welfare* informed another, later pamphlet, namely Great Britain, War Office, *Comrades in Arms – Three Talks to Junior Officers or Officer Cadets to Assist Them in the Handling of Their Men* (June 1942; Canadian Reprint December 1942), especially Lecture No. 3, “Looking After the Men’s Welfare,” 17-26. In the latter talk, which like all others was designed to help “instruct young officers and cadets in the management and handling of men,” the more blunt statements as cited in the above text were for whatever reason omitted. Were these statements indicative of class bias? Was the author simply being economical in the interest of space, picking the most important tips from the former to include in the latter and nothing more? The tone and content of each pamphlet offers sure scope for a study of the assumptions that informed each.
- 14 See LAC, RG 24, Vol. 9797, CMHQ, 2/GEN/1/2, “Memorandum on the Instruction of Officers,” circa 28 October 1940, where it is stated: “It is the Commanding Officer’s task to ensure that all officers continue their studies, and that this is done in a way which will encourage them to seek out information for themselves, absorb it, impart it to their sub-units and generally to contribute to the efficiency of the unit as a whole.”

- 15 Geoffrey Hayes, "We need leaders – God, how we need leaders. Exploring Bad Officership in the Canadian Army, 1939-1945," Unpublished paper submitted to the Canadian Forces Leadership Institute, Contract 091124, 12. Many thanks are given to Dr. Hayes for his kind permission to draw freely and copiously from his unpublished work. Material taken from his manuscript in support of arguments made herein has been attributed to Hayes, rather than to the original source from which it was first gleaned, in order to show direct provenance and to ensure that proper credit is fully given to him. CFLI hopes to publish Dr. Hayes' work at some point in the near future.
- 16 Ibid.
- 17 As quoted in Ibid.
- 18 As quoted in Ibid., 13.
- 19 Officers also derived information on leadership from other media too, such as instructional films; this particular format, however, has not been discussed here. One possible example includes "C.A.4 – Winter Training and Man Management."
- 20 As a representative example drawn from many, see "Advice for Officers," *CATM*, no. 42 (September 1944), 4.
- 21 As a representative example drawn from many, see "What Your Men Will Expect of You," *CATM*, no. 41 (August 1944), 12. See also, "FOLLOW-ship," *CATM*, no. 30 (September 1943), 15-16.
- 22 As a representative example drawn from many, see "The Handling of Men," *CATM*, no. 45 (December 1944), 20-21.
- 23 Analyses of officer-man relations during the Great War are abundant from the British perspective, but scant from the Canadian. Concerning the former, see G.D. Sheffield, *Leadership in the Trenches: Officer-Man Relations, Morale and Discipline in the British Army in the Era of the First World War* (London: Macmillan, 2000); G.D. Sheffield, "Officer-Man Relations, Discipline and Morale in the British Army of the Great War" in Hugh Cecil and Peter H. Liddle, eds., *Facing Armageddon: The First World War Experienced* (London: Leo Cooper, 1996); G.D. Sheffield, "A very good type of Londoner and a very good type of colonial: Officer-Man Relations and Discipline in the 22nd Royal Fusiliers, 1914-18" in 'Look to Your Front: Studies in the First World War by The British Commission for Military History (Staplehurst: Spellmount, 1999); G.D. Sheffield, "Officer-Man Relations: The Other Ranks' Perspective" in Michael S. Neiberg, ed., *The World War I Reader – Primary and Secondary Sources* (NY: New York University Press, 2007); Helen B. McCartney, *Citizen Soldiers: The Liverpool Territorials in the First World War* (Cambridge: Cambridge University Press, 2005); David Englander, "Mutinies and Military Morale" in Hew Strachan, ed., *The Oxford Illustrated History of the First World War* (Oxford: Oxford University Press, 1998); Richard Holmes, *Tommy: The British Soldier on the Western Front, 1914-1918* (London: Harper Perennial, 2004); and John Baynes, *Morale: A Study of Men and Courage: The Second Scottish Rifles at the Battle of Neuve Chapelle, 1915* (New York: Praeger, 1967). Unpublished sources, from Canada, include James Brent Wilson, "Morale and Discipline in the British Expeditionary Force, 1914-1918" (unpublished M.A. thesis, UNB, 1978) and Isabella Diane Losinger, "Officer-Man Relations in the Canadian Expeditionary Force, 1914-1919" (unpublished M.A. thesis, Carlton University, 1990).
- 24 In an instructional pamphlet written for members of McGill University's C.O.T.C. less than a month after the outbreak of war, Brooke Claxton, a First World War veteran and later Canada's Minister of National Defence, remarked on this point specifically: "The officer who recognizes that rank involves responsibilities to be discharged and who acts on that

- recognition is the kind of officer that superiors and subordinates alike want to have with them." See Brooke Claxton, *Notes on Military Law and Discipline for Canadian Soldiers*, 1st Ed. (Montreal, 1939), 35. A second, revised edition appeared in 1940 under the same title. Such comments were echoed a few years later in a document dealing with the training of reinforcements: "Officers must be taught to appreciate that they are leaders and that rank has its responsibilities. They are not only on duty 24 hours in the day but their actual working time is of necessity a great deal longer than that required by the rank and file." See *LAC*, RG 24, Vol. 9823, CMHQ, 2/OFFRS TRG/1, Draft "E" Group Training Directive – Officers Training, 15 July 1943.
- 25 Doctoral research currently underway by the current author is attempting to fill this noticeable void. One of the more insightful discussions of leadership available thus far is to be found in Tim Cook, *Shock Troops: Canadians Fighting the Great War, 1917-1918* (Toronto: Penguin, 2008), 201-208. Relating to officer-man relations, the inadequate state of the Canadian literature as compared to the British has been traced in Craig Leslie Mantle, "Stripes, Pips and Crowns: A Review of Canadian and British Literature Concerning Inter-Rank Relations during the First World War," Unpublished term paper for University of Calgary, Dr. P.H. Brennan, STST-613, "Canada and the First World War," 8 December 2006.
- 26 *Comrades in Arms*, 17.
- 27 "Notes for Young Officers on Leadership," *CATM*, no. 13 (April 1942), 26.
- 28 *The Soldier's Welfare*, 9.
- 29 "Notes for Young Officers on Leadership," *CATM*, no. 13 (April 1942), 26.
- 30 See *The Soldier's Welfare*.
- 31 Great Britain, War Office, *The Officer and Fighting Efficiency* (Canadian Reprint August 1942), http://regimental-rogue.com/srsub/fighting_efficiency.htm, last accessed 17 March 2009.
- 32 *Comrades in Arms*, Lecture No. 1, "The Officer and Man Relationship," 3-8. See also, *Canadian War Museum*, Major Ernest George Moogk, 58A1 172.18, "Duties of Officers," 18 February 1941, where the basic outlines of the paternalistic relationship are listed in point form, to wit, dealing with complaints, giving advice, ensuring men have the "necessaries" required to do their job, knowing men on an intimate level, entering into off-parade activities with them, and so forth.
- 33 As quoted in Hayes, "Exploring Bad Officership," 26.
- 34 The importance of understanding subordinates, and the techniques that officers could adopt to achieve such an understanding, is outlined in *Comrades in Arms*, Lecture No. 2, "Understanding the Men," 9-16.
- 35 CIX, "Letters to An Adjutant," *CDQ* 1, no. 3 (April 1924), Letter No. 6, 91.
- 36 Of course, as officers rose through the ranks, assuming responsibility for more and more soldiers with each successive promotion, their ability to truly know each man whom they commanded decreased proportionally.
- 37 As quoted in Hayes, "Exploring Bad Officership," 14-15.
- 38 As quoted in *Ibid.*, 15.
- 39 "How Do You Measure Up?" *CATM*, 1941 Digest, 14-15.
- 40 "Notes for Young Officers on Leadership," *CATM*, no. 13 (April 1942), 25.
- 41 "Care of Men," *CATM*, 1941 Digest, 9.
- 42 *Comrades in Arms*, 20.
- 43 "Notes for Young Officers on Leadership," *CATM*, no. 13 (April 1942), 25.
- 44 *Ibid.*, 22. In light of such a statement, why were so many of Canada's senior military leaders distant, cold, dull and aloof, the exact opposite of what was actually encouraged? Was it due to

- their personality exclusively, or did their formative experiences, both civilian and military, play a role as well? Was it somehow a function of rank and appointment? Something else altogether? All are interesting questions that deserve consideration but are beyond the scope of the present discussion.
- 45 *Comrades in Arms*, 23.
- 46 "Man Management," *CATM*, no. 27 (June 1943), 19.
- 47 "What is 'Good Discipline'?" *CATM*, no. 31 (October 1943), 4.
- 48 "Leadership," *CATM*, 1941 Digest, 3.
- 49 Claxton, *Notes*, 31. Along similar lines, Claxton observed, "Each man must know that he will get a scrupulously fair deal. This must extend outside the orderly-room and into every corner of the soldier's life." *Ibid.*, 35.
- 50 "An Officer's Code," *CDQ* 3, no. 4 (July 1926), 479.
- 51 Terry Copp, ed., "General Simonds Speaks – Canadian Battle Doctrine in Normandy," *Canadian Military History* 8, no. 2 (1999), Lieutenant-General G.G. Simonds to officers of 3rd Canadian Infantry Division and 2nd Canadian Armoured Brigade, 16 July 1944, 74.
- 52 *Ibid.*, 76. Some of Simonds' other views on leadership can also be found in Terry Copp, ed., *Guy Simonds and the Art of Command* (Kingston: CDA Press, 2007), especially "Essential Qualities in the Leader," 19 February 1944, 21-24.
- 53 Claxton, *Notes*, 33.
- 54 "The Duties of an Officer," *CATM*, no. 10 (January 1942), 6. Italics in original. See also *Comrades in Arms*, 4.
- 55 Claxton, *Notes*, 35.
- 56 Colonel G. Brock Chisholm, *Morale – A Platoon Commander's Responsibility for the Morale of His Men* (Toronto: National Committee for Mental Hygiene, 1941), 4 and 14-15, respectively. Italics added for effect.
- 57 Kim Beattie, *Dileas: History of The 48th Highlanders of Canada – 1929-1956* (Toronto: 48th Highlanders of Canada, 1957), 57-58.
- 58 "The Duties of an Officer," *CATM*, no. 10 (January 1942), 5.
- 59 For one of many possible references, see Great Britain, War Office, *Right or Wrong? Elements of Training and Leadership Illustrated* (1937), Illustrations 74 and 75, 44, where the obvious implication is made that an officer must be at the front. In this particular scenario, an officer is encouraged not to direct his patrol from a map, but rather to personally observe the ground over which his patrol will travel and then issue his orders.
- 60 "Character and Leadership," *CATM*, no. 32 (November 1943), 46.
- 61 See "Officers are Gentlemen," *CATM*, no. 39 (June 1944), 21. See also *LAC*, M.B.K. Gordon Fonds, Manuscript Group 30-E367, Vol. 2, Folder 18, Brigadier A.M. Thomas, 3 Canadian Army Tank Brigade, to Commanding Officer, 27 Canadian Army Tank Regiment, 27 March 1943, on the department of officers.
- 62 *LAC*, RG 24, Vol. 9823, CMHQ, 2/OF-FRS TRG/1, Draft "E" Group Training Directive – Officers Training, 15 July 1943.
- 63 Chisholm, *Morale*, 5-6.
- 64 As quoted in Hayes, "Exploring Bad Officership," 27.
- 65 One such officer might possibly be Sydney Valpy Radley-Walters. "Rad," as he is simply known to many, was a highly competent and decorated (D.S.O. and M.C.) squadron commander in the Sherbrooke Fusilier Regiment (SFR) who cared deeply for his soldiers and treated them with profound respect. On many accounts, he exemplified much of the advice that the Canadian Army offered in connection with man management, as a comparison of the present chapter with Craig Leslie

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- Mantle and Lieutenant-Colonel Larry Zaporzan, "The Leadership of S.V. Radley-Walters: Enlistment to D-Day – Part One of Two," *Canadian Military Journal* 9, no. 4 (2009), 70-80, and, Craig Leslie Mantle and Lieutenant-Colonel Larry Zaporzan, "The Leadership of S.V. Radley-Walters: The Normandy Campaign – Part Two," *Canadian Military Journal* 10, no. 1 (2009), 56-67, would readily attest.
- 66 One such officer in the SFR remained well to the rear in safety, attempting to direct his soldiers' actions over the wireless; any respect that the men held for him quickly (and no doubt permanently) evaporated. See Lawrence James Zaporzan, "Rad's War: A Biographical Study of Sydney Valpy Radley-Walters from Mobilization to the End of the Normandy Campaign, 1944" (unpublished M.A. thesis, UNB, 2001), 223.
- 67 Brooke Claxton thought that "Men in the army as elsewhere respond far more readily to encouragement and praise than to censure though that may be necessary on occasion." See Claxton, *Notes*, 35.
- 68 As quoted in Hayes, "Exploring Bad Officership," 7.
- 69 Douglas E. Delaney, *The Soldiers' General: Bert Hoffmeister at War* (Vancouver: UBC Press, 2005), 22-23.
- 70 *The Officer and His Job*, 5.
- 71 *Comrades in Arms*, 26.
- 72 *The Officer and His Job*, 8.

Trained to the Nines?¹ Readyng the South Saskatchewan Regiment for War

Russ Benneweis

In the Second World War, the majority of the Canadian Army spent five days training for every one day in combat. And yet historians largely ignore the subject of training despite its strong correlation to combat performance.² Instead, they have used their analyses of the Canadian Army's combat performance to infer about the quality of its training. A thorough examination of time spent preparing for combat is overdue. The purpose of this chapter is to assess the quality of training of the South Saskatchewan Regiment [S. Sask. R.], as a case study to better understand the Second World War experience of the Canadian Army.³ Examination of key aspects of the regiment's training—the early years and the introduction of 'battle drill,' preparations for Dieppe and its aftermath, the quality of regimental commanders, and training for Normandy—demonstrates an uneven record of achievement. Bearing in mind the inherent difficulties of military training in general and especially in an army composed primarily of citizen soldiers, this chapter does not to suggest that all training was useless. In battle, the S. Sask. R. and indeed the Canadian Army as a whole succeeded as often as it failed. Rather, it sets out to establish a link between methods utilised in the preparation for combat and battlefield performance, and ultimately illustrates areas where a greater degree of realism and standardisation may have saved lives on the battlefield.

The Early Years and Introduction of Battle Drill

Having learned from the confused mobilisation in 1914, Canadian political and military leaders agreed in the 1930s to create a series of deployment plans that would allow for a speedy and organised reaction to a future war. Defence Scheme No. 3 was designed to take effect in the event of an overseas war requiring the formation of a Canadian expeditionary contingent. The plan called for three Canadian divisions, a corps headquarters plus necessary ancillary troops to be raised, and would eventually serve as the model for the 1941-1942 Canadian Army Programme.⁴ The composition of the expeditionary contingent would consist of "units of the Canadian Militia, wearing the badges and the titles of regiments long familiar to the [local]

public, and inheriting traditions and *esprit de corps* which were a part of Canadian history."⁵

The South Saskatchewan Regiment was one of the many units raised under Defence Scheme No. 3. On 1 September 1939, mobilisation of the S. Sask. R. began at:

Weyburn [Saskatchewan] under the command of L[iutenant] Colonel J.E. Wright. [He] immediately telephoned the officers of the S[outh] S[askatchewan] R[egiment] instructing them to attend a rendezvous at Weyburn at 1500 h[ou]rs in the Legion Hall. When they arrived it was made known to them mobili[s]ation had begun and the S[outh] S[askatchewan] R[egiment] had been the only Infantry Unit in M[ilitary] D[istrict] 12 ordered to mobilise, an honour given in accordance with their previous efficiency record...The spirit of the Unit can be easily seen; when it was made known that it was a voluntary enlistment, the officers presented themselves one hundred percent for the call of King and Country.⁶

The recruitment of enlisted personnel proceeded at a more pedestrian pace, commencing on 5 September with a total of eighteen men being taken on strength [TOS] the first day.⁷ The trickle of volunteers continued in the coming days; eleven on the 11th, nine on the 14th, nineteen on the 27th, twenty-three on the 29th and nine on the 30th.⁸ Lower than expected inductions forced the unit to establish recruiting depots in the surrounding communities of Ceylon, Regina and Moose Jaw.⁹ Recruiting drives continued across southern Saskatchewan into October with the regiment reaching its allotted number of 26 officers and 774 other ranks by October 11.¹⁰ Although reaching full establishment in slightly more than a month can hardly be considered tardy, it was certainly much slower than the common Canadian narrative implies. This begs the question: did 28th and 46th Battalions' veterans discourage their sons from joining the S. Sask. R., or did their sons opt instead for the navy or the air force? The complicated subject of war enthusiasm in Canada during the Second World War has not yet been fully addressed by Canadian historians.¹¹

The initial September 1939 buildup was followed by instruction from Ottawa in March 1940 to re-open recruitment, as a revised and larger war establishment had been issued.¹² The war diary entry for 26 March called for 515 extra recruits to bring the unit to its updated strength of 996 all ranks.¹³ By mid-April the battalion had achieved its recruiting goals.¹⁴

Training to this point consisted mostly of route marches and rudimentary drill. The first winter of the war was particularly harsh, forcing much of the training to be conducted indoors. However, in October a non-commissioned officers' school was opened and, "[t]he results of early and good NCO training became evident as the fall and winter progressed. Those first NCOs became the backbone of future leadership in the battalion. Many of them were eventually W[arrant] O[fficer]s and commissioned officers on the field of battle."¹⁵

Mobilisation plans in Defence Scheme No. 3 included instructions for Permanent Force [PF] men to be assigned to militia units to assist with training. In the case of the S. Sask. R., this originally meant the assignment of a lone PF sergeant to the battalion. The war diary entry for 14 September mentions a new training syllabus had been worked out and that on the 15th physical training had begun under 'his supervision'.¹⁶ The power arrangement in such a situation may have been difficult, for it is unclear by unit records how it was actually negotiated. Surely it required magnanimous gestures on the part of officers and tactful leadership by the PF NCOs.

A severe army-wide shortage of even the most basic equipment, such as boots, uniforms and weapons, greatly impeded practical training throughout the winter of 1939-40.¹⁷ War Diary entries in November 1939 illustrate increasing frustration with the lack of proper clothing and equipment, and how these shortages adversely affected training progression and morale.¹⁸ The unit did not receive its full equipment allotment until 3 February 1940.¹⁹

Nonetheless, heightened weapons training slowly entered the training syllabus by the beginning of 1940.²⁰ In June the unit was moved to Camp Shilo outside of Brandon, Manitoba and together with the Calgary Highlanders and the Queen's Own Cameron Highlanders of Canada formed the 6th Infantry Brigade of the 2nd Canadian Infantry Division.²¹ According to the battalion historian at this time, "[t]raining commenced in earnest; night compass marches, patrols, range work, trench digging, bayonet practice, route marches, and platoon and company tactics in attack and defence."²² Army life and the harsh weather at Shilo led some volunteers to reconsider their decision to enlist:

Blistering hot days suddenly turning to torrential rains, and short-lived tornadoes felling tents and filling cook houses with dust, soon toughened the men to meet the vagaries of the weather. Towards the end of August the rigours of army life proved too much for many men and transfers and discharges were arranged.²³

While 6th Brigade laboured at Shilo, the commander of 2nd Canadian Infantry Division was unsatisfied with training progress in his division. In a letter dated 3 July 1940 to the Minister of National Defence, Major-General Victor Odlum described the state of his formation as “not only not gaining ground but...actually deteriorating. No advanced training has been possible, and I have not been in a position to exercise any command.”²⁴ In the same letter Odlum noted that it would be wise for “the Division to move almost at once to an area where it could undertake that collective training without which it can never be a Division in more than name.”²⁵ In a subsequent letter to the minister the following day, Odlum continued that, “[a]t the present time, [he had] no such force as a 2nd Canadian Division. The framework exists, and the personnel [are] mobili[s]ed, but it is so scattered, and so untrained, that it is not yet a division...[T]he units have had instruction in only the more elementary subjects and are no further advanced than they should be in two months of effective training.”²⁶ Odlum concluded by asking to be relieved of his command, “the sooner...the better,” should the division not be brought together for collective training and instructors capable of teaching the art of soldiering already overseas not be returned to Canada. Nearly a fortnight later, the Minister advised Odlum not “to simply be an advocate but rather to help to consider all factors which have to be taken into account,” and that his not-so-veiled threats did “not assist in dealing with a situation which is complex enough.”²⁷ Although it was later decided that the 60 year-old Odlum was not fit to command in the field, experience led him to realise that training methods had to be dramatically improved.

In the coming months, training slowly advanced beyond the battalion level. The first brigade tactical was held 27 August 1940. It was a rudimentary but pedagogically important advance-to-contact exercise designed to train the troops in moving to an attack position via motorised transport, and in the setting of defensive positions. Nine errors made during the exercise were listed in a document titled, ‘Notes on Conference following Brigade Tactical Scheme.’ It illustrates the level of training achieved by the unit to that point and that brigade officers, in this instance, were attempting to learn from their mistakes. Incidents of special concern included: stressing the need of following the instructions contained in the Operational Orders to the letter; conducting signals in a timely, proper fashion; carrying out suitable reconnaissance prior to, during and after contact was made with the enemy; and the proper function of the [motorised] carrier platoon.²⁸ Unfortunately, the notes concerning lessons learned during the brigade exercise were the only written example of such in the battalion’s war diary for the duration of

training. It is difficult to imagine how a common doctrine could have been systemised throughout the battalion, let alone the entire Canadian Army, in such a manner.²⁹

During this period the battalion continued to conduct advance-to-contact exercises in its preparation for combat. Each platoon undertook a sixty mile, two-day motorised transport move after which tactical exercises were carried out. Subsequently, each company completed a combined motorised transport/route march of not less than two days, again with the accompanying tactical exercise. At the battalion level, the S. Sask. R. completed a four-day, four-hundred mile move, while the entire brigade later carried out a one-hundred-and-fifty mile move as a group, of which twenty-five miles was by foot.³⁰

In October, the battalion was transported to Toronto and the Horse Barracks at the Canadian National Exhibition Grounds where they remained until embarkation for England in mid-December.³¹ The primitive living conditions endured by the men severely tested unit morale and stifled realistic training. Basic lectures, drill, and route marches filled the men's days.³² The unit entrained for Halifax on 13 December 1940 and after a nine day voyage aboard the troopship *Penmland* landed on Christmas Day, 1940 at Gourrock, Scotland.³³ Following a daylong journey by train, the bulk of the regiment re-joined its advance party³⁴ at Morval Barracks in Cove, Hampshire on Boxing Day.³⁵

After a round of landing leave,³⁶ the S. Sask. R. began what would eventually be three-and-a-half years of training in Great Britain. Short refresher courses were run, consisting mainly of indoor lectures on such basic tenets as march discipline, 2-inch mortar instruction, aircraft recognition, and gas and respirator procedures.³⁷ Two important exercises designed to give the unit experience in night movement under blackout conditions and in the quick deployment of defensive positions were conducted in January.³⁸ While basic in nature, these exercises were important training aids made especially so by the Canadian Army's decision to invest heavily in supply and transport.³⁹ Though movement exercises were important, they did little to enhance the fighting ability of the individual soldier or the battalion. To date, the unit had only rudimentary weapons training and had no experience in combined-arms attacks. The battalion was hardly a "dagger pointed at the heart of Berlin."⁴⁰

Beginning in late 1941, one exception to the training routine for the S. Sask. R. was the introduction of 'battle drill.' Early training sessions were conducted by Major McTavish, who, along two other battalion officers,

would attend the Canadian Army's Battle Drill School when it opened later that winter.⁴¹ How he conducted 'battle drill' training prior to the course is unknown. Nevertheless, one is able to behold the slow creep of 'battle drill' into the battalion's training over the course of January, 1942, a platoon at a time.⁴²

The concepts of 'battle drill' and 'Battle Drill Training' are easily conflated, but must be differentiated. 'Battle Drill Training' entailed a wide range of training activities, including 'battle drill,' while the latter concentrated on rote practise of tactics on the parade square. Officially:

'Battle Drill,' according to the manual *Fieldcraft and Battle Drill*, means the reduction of military tactics to bare essentials which are taught to a platoon as a team drill, with clear explanations regarding the objects to be achieved, the principles involved and the individual task of each member of the team. 'Battle Drill Training,' on the other hand, is more comprehensive. It consists of a high standard of weapon training, purposeful physical training, fieldcraft, battle drills proper, battle discipline and battle inoculation.

Battle Drill training is founded upon the axiom that until every soldier looks on himself as a ruthless killer, using cover with the facility of an animal, using his weapons with the practised ease of a professional hunter and covering the ground on the move with the agility of a deer-stalker, infantry battle training will be based on false foundations. Its object is, therefore, to inculcate into a body of fighting men a system of battle discipline and team spirit, and to give every man a knowledge of certain basic "team plays" which will guide him in any operation he may undertake in battle. It has the further advantage of making the men physically fit, relieving boredom in training, and inoculating the soldier and his commander against the fear and noises of battle.⁴³

It has been suggested that 'battle drill' and 'Battle Drill Training' spread like wildfire through the Canadian Army.⁴⁴ Yet, the 'battle drill' fad⁴⁵ does not seem to have affected the S. Sask. R. nearly as much as it is reported in other units of the 2nd Canadian Infantry Division. Indeed, mention of this new form of training in the war diary and its appendices are spotty, suggesting that the battalion was either slow in its incorporation or had become leery of its training value.

A snapshot view of 'battle drill' and 'Battle Drill Training' from the perspective of a battalion other than the Calgary Highlanders is revealing. It is widely recognised that the Calgary Highlanders was the driving force behind the surge of 'battle drill' popularity in the Canadian Army during the Second World War.⁴⁶ After witnessing a performance of 'battle drill' training by British 47th Division, Lt.-Col. F Scott of the Highlanders became convinced that 'battle drill' was not only a useful training tool but also a revolutionary answer to the problems of boredom and malaise affecting his battalion.⁴⁷

Although it has been presumed to have been pervasive, the degree to which 'battle drill' influenced training in battalions other than the "fanatical disciples"⁴⁸ of the Calgary Highlanders has not been researched. Indeed, the S. Sask. R. did not elevate it to such heights that it eclipsed the battalion's many other training methods. Evidence shows that 'battle drill' was seen as one training technique, but nothing more. That the Calgary Highlanders was not chosen to participate in the Dieppe raid suggests that mastery of 'battle drill' may not have been highly sought after by British High Command. Lt.-Gen. Montgomery, who played a large role in the selection of the 4th and 6th Brigades for *Operation Jubilee*⁴⁹, was critical of 'battle drill' disciples, noting that "[i]t does not seem to be understood that Battle Drill is really a procedure, applicable to unit and subunit action [and that] the company [within the battalion] still has to be taught how to carry out the various operations of war."⁵⁰

In fact, there was very little innovativeness to 'battle drill.' The term itself dates back at least to 1917 when Ivor Maxse applied, "the principle of drill to tactical training for modern warfare," and the principles of drill into, "such combat functions as platoon organisation, deployment into tactical formations, [and] the advance to contact."⁵¹ An original précis written by the 47th British Division during the Second World War and later copied by the Calgary Highlanders actually stated that "Battle Drill does not teach any new or revolutionary tactics, but is based on the tactical principles set forth in F[ield] S[ervice] R[egulations] and the Army Training Manuals."⁵² Using a sporting analogy, the history of 'Battle Drill' in the 47th Division noted its proper role as a way to give the, "junior commander a firm base on which to develop his individual initiative, much in the way a young cricketer is taught the basic principles of stroke play on which later he develops his own style."⁵³

In 1943, the regularity of 'battle drill' in the battalion's training syllabus was overtaken with the call for increased parade square drill. Henceforth the battalion would conduct at least one hour per week, every week on marching and saluting drill and to undertake 'battle drill training' *once every three*

weeks.⁵⁴ That no mention was made of 'battle drill' in the revised infantry training instructions in the early fall of 1944⁵⁵ may illustrate that, "[battle drill was] indeed a pedagogical dead end,"⁵⁶ and did not as argued, "encapsulate the general thrust, pulse and...effectiveness of the Canadian Army training at the lower end."⁵⁷

The introduction of 'battle drill' coincided with a period of reduced morale in the battalion, and the Canadian Army as a whole. The main problems encountered, "were boredom, homesickness and disappointment" as the men trained to the, "point of staleness."⁵⁸ Canadian commanders saw 'battle drill' and 'Battle Drill Training' as methodologies that, "offered more exciting and challenging training. To many it seemed the antidote to boredom."⁵⁹ In this sense, 'battle drill' would seem more an end than a means to an end.

The state of morale in a military formation is an intangible element, difficult to measure.⁶⁰ Morale fluctuated within the S. Sask. R. over the training years, but probably never exceeded good. Disciplinary problems, a classic signal of low morale, dated back to the fall of 1939 when a number of original volunteers were arrested for brawling and for vandalising businesses in Regina with Germanic names.⁶¹ Morale plummeted with the cancellation of *Rutter* and the results of *Jubilee*. Faced with another winter in England, regimental morale dropped again in late 1943.⁶² Canadian soldiers have generally been viewed as patriotic, eager and well-trained during the waiting years in Canada and Great Britain, but it was not always the case. This should come as little surprise. Taking into account four-and-a-half years of training, much of that in a foreign land within the stifling confines of military discipline, with no hope of home leave and with little communications possible to loved ones, it is a wonder the men held up as well as they did.

Unfortunately for the men of the S. Sask. R., time not spent on 'battle drill' or parade square drill did not necessarily mean it was utilised for useful training measures. Indeed, considerable time was taken from meaningful combat training for a variety of reasons during the unit's tenure in Great Britain. The battalion received dozens of Most-Distinguished Visitors (MDV's) over the years, ranging in importance from the King to brigade commanders. Generally, the more distinguished the MDV the longer the unit polished drill and deportment. A brigadier's visit usually constituted a day's practise⁶³ while the greater part of July, 1943 was spent preparing for *Exercise Flag*, the occasion at which King George VI presented the unit its colours.⁶⁴ It is not exaggerating to state that months of training time were lost preparing for the reception of MDV's.

Extensive semaphore training was another activity with questionable utility conducted by the S. Sask. R. during its stay in England. Starting in March, 1940 practise in the use semaphore communications occupied a regular place in the battalion's training syllabus into the spring of 1944, but especially in the months following the Dieppe raid.⁶⁵ Training of this nature indicates a fundamental lack of understanding of modern warfare on the part of Canadian leadership and an instance where leaders really were preparing to fight the last war. It could also have been a manifestation of the need to fill five-and-a-half days a week of training syllabus for years on end.

More training time was lost when the entire 2nd Canadian Infantry Division was shifted to the south coast of England on 2 July 1941 to serve ostensibly as an anti-invasion force. But beating back an unlikely invasion was not the only reason for the relocation as:

This movement may have been partly inspired by a desire to give a salutary change to the troops involved...Aldershot ha[d] not been a popular station with Canadian Officers and men; and experience seems to show that an occasional change of scene is the best means of combating the boredom which is only too likely to arise among the troops not actively employed. Conversations with various officers of 2 C[ana]d[ia]n Div[ision] seem to leave no room for doubt that this particular move [had] a good effect on the morale of the division. Among other advantages, it has brought the men the opportunity of bathing in the sea.⁶⁶

The battalion remained at station on the south coast for the subsequent eleven months, finally moving to the Isle of Wight in May, 1942 to begin training for Dieppe. The unit did participate in a number of exercises, including *Bumper*, while on the coast but did little 'battle drill training.'⁶⁷ The menial nature of the work and a note of exasperation are evident in the war diary entry for 6 January 1942 stating that, "[r]evetting and digging of defence positions [were] still being carried out in Co[mpan]y areas."⁶⁸ Less than a week later, the unit was ordered to move the defensive positions a few yards further from the sea. "Digging commenced on new [p]os[iti]o[n]s"⁶⁹ on 12 January 1942 and continued throughout the remainder of the month.⁷⁰ In terms of teaching the men new and innovative doctrine to be used in combat, little was accomplished during the unit's time on the south coast. However, the battalion training regime was about to undergo a sudden and radical change as an assault on occupied France was in the unit's immediate future.

The Dieppe Interlude

With the move to the Isle of Wight, the battalion's assault training for the Dieppe operation began. It entailed, "[r]ugged assault training...forced speed marches, cliff and wall climbing, unarmed combat, breaching wire obstacles, (and) hours of practi[s]ing landings from A[ssault] L[anding] C[raft]s."⁷¹ Individual and unit training progressively became more specialised to eventually include, "village and street fighting drills, crossing wire obstacles on a defended beach in both section and platoon order, gun and installation destruction, climbing by platoon, platoon and Company withdrawal, 2" and 3" mortar drill, stalking and sniping, drill on board ship, drill on Assault Landing Craft, drill after boat beaches [a] if silent landing is achieved and [b] if enemy opens fire upon landing, [and finally] drill at rendezvous and drill at consolidation."⁷²

Training progressed to include mock landings by the assaulting brigades. *Exercises Yukon I* and *Yukon II* were full-scale dress rehearsals for the Dieppe operation. The battalion's intention during *Yukon I* was to land and secure 'Green Beach,' to destroy all enemy within its perimeter, and to hold the bridgehead until ordered to re-embark. From the perspective of the 2nd Canadian Infantry Division, the exercise did not go well. Historians' views of *Yukon I* range from a 'dismal failure' to a 'cock-up'.⁷³ *Yukon II* was authorised because of the horrendous results of its predecessor. The latter scheme went better, but only comparatively so.⁷⁴

Following another round of polishing-up training for the battalions chosen to conduct the assault, the division was deemed ready. The cancellation and eventual reinstatement of the raid is well-known; however the consequences to individual and unit training are not as well-understood. Leaves were granted in large numbers during the month of July and in early August for the men to "blow off steam."⁷⁵ Although the stated objectives for August were to develop offensive attack skills from platoon level to the battalion as a whole, training was eased considerably from the beginning of the month right through to the days preceding the raid.⁷⁶ No refresher assault training or exercises practicing amphibious landings were conducted in preparation for *Jubilee*.

The cost of *Jubilee* to the battalion was devastating; of the 25 officers and 498 other ranks landed at Dieppe, 19 officers and 321 other ranks were casualties. Three officers along with 81 other ranks were killed.⁷⁷ If there truly was a lesson from the Dieppe operation, it was that amphibious assaults were extremely difficult and much greater training of the attacking force was necessary. The definitive history of *Operation Jubilee* must include substantial research on the adequacy of training conducted by the assaulting units.

The Aftermath of Dieppe

In the months following *Jubilee*, the battalion set about reconstituting itself. 'Training as per syllabus' was a constant theme of the battalion's war diary. Although the allure of large scale exercises and 'battle drill' have captured the imagination of military historians, much more of the soldier's time was spent training by the book. For the S. Sask. R., this consisted of the same essential ingredients for nearly five years: route marches, drill, bayonet training, grenade practise, clearing of mines and booby traps as well as the ubiquitous Test of Elementary Training (TOET) on the rifle. Although a convenient method of occupying the men's time, it must have been incredibly tedious for the soldiers who practised it and the junior officers and non-commissioned officers who administered it. Cumulatively, the men spent months doing bayonet practice. One must wonder if improvements in morale and combat efficiency could have been achieved had the training syllabus been spiced up.

Nor did 'training as per syllabus' change appreciably in the Canadian Army after months of combat in Northwest Europe. The war diary entries of a reinforcement unit reveal that 'training as per syllabus' in the spring of 1945 remained nearly identical to training carried out by the S. Sask. R. in 1941. Besides the addition of individual training on the infantry flamethrower, 'training as per syllabus' consisted of the same mundane ingredients.⁷⁸ The great deal of time spent 'training as per syllabus' did not produce proportional benefits and was, seemingly, instituted by a Canadian High Command that failed to understand the need to establish a more-creative and -productive training regime for its soldiers.

Like 'battle drill,' large scale exercises have received a great deal of attention from military historians. From the points of view of staff, ordnance, and transport personnel, *Waterloo*, *Bumper* and *Spartan* were necessary rehearsals to an army training for war. They also served to wash out incompetent commanders—although controversy remains regarding the removal of A.G.L. McNaughton for his performance in *Spartan* in March, 1943.⁷⁹ Judging by the performance of divisional commanders in Normandy, the Canadian Army may have benefited had it run additional weeding-out exercises prior to D-Day.⁸⁰ Besides hardening, large scale exercises did little to enhance the fighting potential of the individual soldier or his unit. Rather, dozens of long-forgotten battalion and brigade exercises were carried out to achieve this end. The degree of standardisation of training in these smaller exercises within the Canadian Army as a whole has yet to be determined. While not as intriguing to the scholar, these smaller exercises occupied a far greater proportion of the unit's training than did large schemes such as *Spartan* and *Bumper*.

An example of the many smaller-scale schemes conducted by the battalion in the aftermath of Dieppe was *Exercise Repeater*, set in March, 1943. *Repeater* was designed to practise the platoons in ‘fire and movement’ manoeuvres in cooperation with battalion support weapons.⁸¹ *Exercise Bang* was a rifle company scheme held a week later to rehearse clearing a minefield while under fire.⁸² Though late in coming, *Repeater* and *Bang* were excellent training tools for the battalion.

Another example of what the battalion rehearsed to hone its combat ability was an innovative attack method that called for the section to be divided into three groups—two rifle groups and one Bren gun group—rather than the usual two.⁸³ The reasoning behind the three-group attack formation was:

[t]o exploit the herd instinct, which expresses itself in the natural tendency for friends to group together in order to fight together, and for men to group round their leader The section commander, instead of commanding each man in his section, will command three groups – Nos. 1 and 2 Rifle Groups and No.3 Bren Group. Whatever the size of the section, these three groups should be maintained, so that the section commander has only three men under his direct command. The section commander will decide to be with whichever group is most suitable in accordance with the situation and particular task at hand Groups are formed from friends as far as possible, in order that friends keep together and fight together. One man in each group, which is not commanded by an N.C.O., acts as leader. He should be chosen because of his natural gifts of leadership and because the rest of the group looks to him as a leader Groups can be used in any formations and at any intervals, to suit the ground and the tasks in hand; but they must keep in touch with the section commander and not be with them.⁸⁴

On Christmas Eve, 1943, the battalion participated in one of its most important training exercises to date. *Exercise Crescendo* was run by each battalion of 6th Brigade and was designed to allow infantry battalions practise attacking an enemy position in the daylight, with particular reference to:

- (a) The f[or]m[at]io[n] and method of adv[ance] of the unit and sub-units.
- (b) Fire s[up]p[ort] by b[at]talion w[eap]o[n]s and s[up]p[ort] arms.⁸⁵

Exercise instructions state the scheme's methodology was copied from a master generated by British General Headquarters School of Infantry and that this was to be the model of attack which the Canadians would take into battle in 1944.⁸⁶ On 27 and 28 January, 1944 the battalion conducted a quick attack exercise, code-named *Zip*.⁸⁷ The objects of the scheme, conducted on a platoon-by-platoon basis, were the rehearsal of sound battle procedures by platoon commanders, the formation of adequate fire plans and the proper use of ground, cover, and fire and movement in the course of the attack.⁸⁸ The importance of studying the training period of the Canadian Army is never more evident, for the doctrine to be used in battle was being settled on. Its success in disseminating and systemising the doctrine throughout the army has not yet been determined. These platoon, company, battalion and brigade level schemes did a great deal more for the fighting potential of the S. Sask. R. than large-scale efforts such as *Exercises Waterloo, Bumper* and *Spartan*.

Battalion Commanding Officers

With so much of the training devolved to battalion and even sub-unit levels, the importance of commanding officers at the battalion level is self-evident. Practically nothing is known, however, of the role and performance of battalion commanding officers during training. Canada's official historian of the Second World War, C.P. Stacey declared, with no evidence, "that the Canadian Army...suffered from possessing a proportion of regimental officers whose attitude towards training was casual and haphazard rather than urgent and scientific."⁸⁹ Perhaps this was the case. Further examination of the Canadian Army's training is necessary to verify or refute Stacey's claim. There were instances, however, where commanding officers of the S. Sask. R. took proactive measures to improve training methodology.

An example was *Exercise Curl*, a brigade exercise held on 27 March 1944. *Curl* was designed to allow 6th Brigade to practise the art of marching towards an imaginary front with the added complication of taking turns passing through fellow units on the move in order to afford each battalion the opportunity to serve as brigade vanguard.⁹⁰ The battalion's poor performance in what should have been a simple exercise raised the ire of the Brigadier Young, commander of 6th Brigade. It seems inconceivable that four-and-a-half years of battalion training along with participation in large movement exercises such as *Bumper*, *Benito* and *Spartan* had not been sufficient to master this relatively minor battle tactic. The battalion commander, Lt.-Col. Clift, ordered the men to practise the techniques carried out in *Curl* during the march back to barracks that same day, after which the S. Sask. R. war diar-

ist reported that the battalion “had improved immensely from the first attempt.”⁹¹ This quick and proactive remedial effort by Clift and a complete dearth of evidence suggesting laxness by any of the commanding officers of the battalion during training may counter Stacey’s contention.⁹²

Additionally, regimental commanders can hardly be blamed for training woes within their units when directives from above often set battalion agenda. The Canadian Army persisted in calling for anti-invasion exercises long after the threat of a German attack on England had passed. *Exercise Panther* was one such scheme conducted months after Dieppe; while it may have helped to train the battalion staff, its benefits to the combat readiness of the battalion were dubious.⁹³ Moreover, the practice of senior commanders abdicating leadership roles to serve as exercise director, such as Brigadier Young during *Exercise Hike* in the spring of 1944, was further detrimental to overall combat readiness.⁹⁴ Much of the training the battalion was ordered to undertake was stale, predetermined and against an imaginary enemy. In March, 1944 for example, the battalion took part in *Exercise Shamrock*. Three months before the invasion, *Shamrock* was a scripted battalion exercise with an imaginary enemy force and no artillery or armour support.⁹⁵ As with so many training exercises, a lack of spontaneity devalued the scheme.⁹⁶

Many rehearsals involved components of the battalion other than the rifle companies. A high degree of professionalism is evident in battalion records regarding training undertaken by the signals section and mortar platoon. In one of the few examples of institutionalised training, the battalion mortar platoon embarked on a three-day Brigade Mortar School “to improve and standardise the standard of mortar training in the B[rigade].”⁹⁷ The course consisted of three days of lectures followed by a day of shooting both in the daylight and in darkness—a first for the South Saskatchewan mortar platoon.⁹⁸ It is surprising that the first night shoot of the battalion’s mortars took place nearly four years into the war!

The battalion participated in two potentially instructive exercises in August, 1943. Codenamed *Hammer* and *Pickaxe*, the purpose of these most-complicated to date schemes was to practise an attack scenario by tanks in cooperation with infantry.⁹⁹ An addendum to the exercise instructions of *Pickaxe* illustrates a desire on the part of Canadian High Command to maximise training results:

The objects of the exercise will be carefully explained to every off[ice]r, NCO, and private soldier participating. This is necessary in real operations to achieve the best co-operation; and is just

as necessary in training to get the best results from the effort expended. The explanation and “briefing” must be continuous through the exercise. Arrangements will be made to issue “News Bulletins” each night, which will record the progress of the fighting. Umpires are being instructed to question as many men as possible to find out what they know about the enemy, our troops, and the commander’s intention.¹⁰⁰

As in combat, though, what is set down on paper and what actually occurs in an exercise seldom coincide. In both exercises, the ‘friction’ of combat led the battalion to put in unsupported attacks after being unable to marry-up with supporting armour. The official umpire’s ruling that the battalion suffered numerous casualties while “attacking an enemy strongpoint unsupported”¹⁰¹ grimly foreshadowed the results of *Operation Atlantic*.¹⁰² The exercises required a high degree of exactitude which broke down almost immediately—not unlike the complicated operations designed by Guy Simonds in Normandy for the green troops of 2nd Canadian Infantry Division and 4th Canadian and 1st Polish Armoured Divisions. In assessing the training value of exercises like *Hammer* and *Pickaxe*, it is imperative to look past the stated aims and concentrate on scheme results.

For an army adhering to an artillery doctrine for the attack, it is surprising that there is no record of the battalion advancing behind a live barrage during training. This, combined with a lack of armour/infantry coordination during training, meant the men of the S. Sask. R. would have to learn these critical techniques the hard way—in combat. A clearly defined, practised, and institutionalised doctrine incorporating artillery and armour together with ‘battle drill’ techniques may have benefited the men in battle. In such a scenario, artillery could have shot the men close to their objectives while tactics practised during ‘battle drill’ training, used in coordination with armour, may have led to greater success and lower casualties.

A fatal flaw in the overall Canadian training process was to devolve training responsibilities down as far as platoon and company levels only to impose a strict top-down system of command in combat that limited the initiative of platoon, company and battalion commanders. As previously argued, the degree to which a common fighting doctrine was institutionalised throughout the Canadian Army remains unknown. Numerous war diary entries from the S. Sask. R. stating that training was at the discretion of platoon, company and battalion commanders would suggest that it was slight.¹⁰³ Upon joining the battalion in early 1941 a recently commissioned

subaltern, and PF soldier since 1938, witnessed firsthand the unstructured manner in which training was scheduled. Upon asking for a program of training for his platoon, he was told to write his own as there was nothing to follow.¹⁰⁴ Further impeding standardised battalion training were the crippling losses at Dieppe and the repatriation of sixteen of the unit's most experienced non-commissioned officers in early March, 1942 to serve as instructors for the rapidly expanding Canadian Army.¹⁰⁵

Unlike the Canadians, the United States Army quickly recognised that a lack of qualified trainers posed serious issues and worked quickly to maximise training efficacy. Following an unsatisfactory training inspection, the Chief of Staff of General Headquarters (GHQ), US Army, Lieutenant General Lesley McNair, likened unqualified trainers to, "the blind leading the blind," and the army as having, "verified the inevitable – that inadequately trained officers cannot train troops effectively."¹⁰⁶ The US Army—though numerically much greater than the Canadian—faced the same problems: training a rapidly expanding army, often with inexperienced or incapable officers and NCOs. As opposed to the Canadian system of devolving the generation of training directives to battalions, companies and even platoons, "GHQ (US Army) decided on a centrali(s)ed training process, which took many decisions out of the hands of small-unit leaders."¹⁰⁷ Further research is necessary to determine which national system produced greater results.

Final Preparations for Normandy

For the S. Sask. R., 1944 began with a trip to Scotland for *Exercise Frosty*. Really an assemblage of smaller schemes, *Frosty* would occupy the battalion for the first half of January.¹⁰⁸ Every aspect of warfare, and not just explicit 'combat training,' requires practise. From 2-12 January the battalion conducted a number of smaller schemes, each of which was intended to simulate a portion of the battalion's eventual channel crossing. After a day of preparatory lectures and films, the battalion began hands-on training. Over the next ten days the men practised climbing scrambling nets, boarding Landing Craft, hammock slinging and boat pulling. *Exercise Ramp* taught them the skills needed for night-time disembarkation from a Landing Ship, Infantry followed by passage through a beach transit area. Essentially a repetition of *Ramp*, *Exercise Kedge* was run the next morning and included a move from the transit area to an assembly point.

Training continued with a rehearsal in the loading and disembarking of battalion vehicles. To provide visual realism to the entire process, the battalion screened a film of the American amphibious assault at Salerno. The

realistic sub-exercise *Trident* completed training undertaken during *Frosty*. *Trident* saw the men embark in Landing Craft, Vehicles during darkness and board a Landing Ship, Infantry via scrambling nets. The soldiers were then ordered to sling hammocks and to spend the night aboard ship. In the early hours of the next morning, they were served a hot meal and disembarked for landing on an undefended beach commensurate to their follow-up role. As practised in *Ramp* and *Kedge* the men passed through the designated transit area after reaching shore to the assembly point and dug in. At that point the umpires sounded the cease-fire order for *Trident* bringing *Exercise Frosty* to a successful conclusion.¹⁰⁹

Despite the successful exercise, however, the situation in 6th Brigade had deteriorated significantly by the beginning of 1944. A training directive written by its commander, Brigadier Guy Gostling, illustrates a breakdown in command structure:

I am not satisfied that my instr[uction]s with regard to weekly drill of their com[man]ds by Pl[atoon] Com[man]d[er]s was in fact carried out in Dec[ember] and I remind all units that this is an order!...Orders must be obeyed. If an order is issued by this H[ead] Q[ui]arters] which appears to C[ommanding] O[fficer]s to be unreasonable or which, for some reason or other they feel they cannot comply, then it is their duty to take the matter up with the B[rigade] Com[man]d[er] and not merely fail to carry out the instr[uction]s by default; for instance...that Pl[atoon] Com[man]d[er]s carry out a certain specified type of instr[uction] on specified occasions—i.e. close order drill.¹¹⁰

A number of the platoon commanders had likely concluded that additional parade square drill was useless, that years of boring and redundant square bashing was the cause of poor drill, and the last thing the men needed to cure their malaise was more of the same. Nevertheless, Gostling dismissed the ‘boredom’ aspect of training as a necessary component of the achievement of soldierly competence:

Much tr[ainin]g which involves details similar to above is considered by many Off[ice]rs and O[ther] R[ank]s to be “monotonous”. Since repetition of such details hundreds of times is the only way in which they can be drilled into becoming a habit, a certain amount of monotony will be inevitable. It is, however, true that

if repetition is allowed to be carried out in a sloppy manner it is many times more monotonous than if it is carried out with strict attention to every little detail because there is a very real psychological satisfaction in doing something superlatively well. It is for this reason that highly trained troops do not find carrying even "parade square" drill monotonous because they derive a great feeling of satisfaction out of doing something which they know they are doing almost to perfection.¹¹¹

In the same report, Gostling rebuked the men for finding novel means of relieving their boredom, "It has been noticed that there is much indiscriminate tossing around of thunderflashes and [No.] 77 Grenades. This will cease forthwith and any personnel discharging [them]...will be expected to be able to give a realistic reason for what is being simulated."¹¹² Gostling was also concerned with the methods of those doing the training, four years into the war:

[R]ecent exercises have disclosed that quite a weakness exists in handling attacks at this particular level. Officers notably lack training in the employment of supporting arms in conjunction with their own troops...Too much training is still being carried out in a haphazard manner. Vitally important details are being omitted or are carried out incorrectly and as far as can be seen in many cases the officer or N.C.O. instructing seems neither to know nor care.¹¹³

To remedy these deficiencies, Gostling urged his subordinates to maximise realism while rehearsing, through: the organisation of sound battle procedures by platoon and company commanders; the formation of adequate fire plans; plus the use of ground, cover, and fire and movement in the course of the attack.¹¹⁴ Gostling concluded that, "more effort [be] put into [the] organisation of training by the officers, [for] it is a fatal flaw to carry out training under unnecessarily unreal conditions."¹¹⁵

Gostling's directives are instructive. He must be given credit for recognising the lacklustre training being carried out in his unit and for recommending solutions. However, his order to ramp up parade square drill, one of the primary causes of malaise in 6th Brigade, is puzzling. Two months after tabling this report Gostling was relieved of his command; officially for an, "inability to make sound decisions and (to) issue clear concise orders

(that) will inspire confidence in subordinates during active operations.”¹¹⁶ Perhaps Gostling was fired for allowing the brigade to deteriorate to a state where subalterns openly disregarded directives when setting platoon training syllabi. This further muddies the waters as to where to place blame for lacklustre training in the Canadian Army. Stacey blamed regimental officers, Gostling laid the fault at officers at sub-unit levels, and senior commanders fired Gostling for an inability to train subordinates. There seemed to be plenty of culpability to go around. Gostling finished the war in command of a reinforcement unit. The Canadian Army’s practice of assigning sacked formation commanders to senior leadership positions in reinforcement units is problematic in itself and requires further study.¹¹⁷

Part of 2nd Canadian Division’s training for its forthcoming role as a breakthrough force was to prepare for an assault crossing of a river or a tidal estuary, most likely the Seine.¹¹⁸ With this objective in mind, the division participated in *Exercise Step* from 2-8 April 1944. *Step* was designed:

[t]o exercise com(man)d(er)s and staffs in the handling of t(roo)ps
in:

- (a) breaking out of a br[idge]head.
- (b) the adv[ance] of the div[ision] on a single thrust line.
- (c) the crossing of a river obstacle.
- (d) the assault of an enemy pos[itio]n using live ammunition.¹¹⁹

The S. Sask. R. conducted an unopposed crossing of the River Cuckmere as part of the exercise, but little else. Although the 6th Brigade intelligence log for *Step* noted that the tanks of the 29th Armoured Reconnaissance [South Alberta] Regiment were ordered to assist the S. Sask. R.,¹²⁰ there is no record of the two units actually being able to ‘marry-up’ to practise the vitally important coordination of armour and infantry.¹²¹ Unfortunately, 6th Brigade would not participate in the subsequent *Exercise Kate*, a more-advanced river crossing rehearsal in Yorkshire later that spring. That one entire brigade failed to conduct a single opposed river crossing exercise debunks the notion of 2nd Canadian Infantry Division as a highly trained force in this important tactic.¹²²

In mid-March the battalion received a number of reinforcements from 2nd Canadian Infantry Division Reinforcement Unit. In total, five officers and 150 other ranks were attached to the battalion until it went into action when they would be utilised as replacements for initial battle casualties. The reinforcements were divided up and posted to specific companies for training and acclimatising to ease the transition.¹²³

The battalion moved to the coastal region between Dover and Canterbury in late April, 1944 where it would remain until its embarkation for the continent in July. The move was codenamed *Foible* to disguise its true intentions, but had no training value.¹²⁴ Due to space limitations, 'further and final' training hereafter would mostly be limited to drill, route marches and sports activities.¹²⁵

Two notable exceptions were a 'weapons circus' courtesy of the divisional support battalion, the Toronto Scottish Regiment, and a long-delayed opportunity to undergo badly needed training in the techniques of armour/infantry coordination with the British Columbia [Armoured] Regiment [BCR]. The men were able to get up-close and personal with a number of heavy weapons of the 'Tor Scots' including 4.2-inch mortars, .303 calibre Vickers medium machine guns, and 40mm Bofors and 20mm Oerlikon cannons. Unfortunately, live shoots demonstrating the tremendous power of these weapons were not undertaken.¹²⁶ For the entirety of the battalion's campaign in Northwest Europe, the Toronto Scottish would provide invaluable fire support to the S. Sask. R. Unfortunately, little effort was spent coordinating the actions of the two battalions during training.

The distressing lack of emphasis on armour/infantry coordination in the battalion's training has already been noted. In an attempt to rectify this omission, the commanding officer of the BCR's, Lt.-Col. D. Worthington,¹²⁷ lectured the officers of 6th Brigade in coordinating armour and infantry. The following day, B Squadron of the BCR's was temporarily attached to the S. Sask. R. so that the two arms could learn about the other. The paired units were further sub-divided when troops of tanks were assigned to particular rifle companies within the battalion. The war diary entry for 28 April 1944 described the day's events as a time of "get[ting] to know one another."¹²⁸ From there the training intensified, with the tankers demonstrating mounting and dismounting drills and giving the infantrymen a thorough description of their tanks' armour protection and armament.¹²⁹ The men were next given an opportunity to practise riding in and on the tanks. The battalion concluded its tank/infantry training with three days of practise in organising a 'forming up position' prior to an attack, the coordination of an attack, and the consolidation of ground captured during the advance. Neither live ammunition nor an opposing force was utilised to enhance the realism of the training.¹³⁰ The relatively rudimentary nature of this vital training barely two months prior D-Day is startling.

While the battalion rehearsed laying minefields on the night of 13 May 1944, the practice of bouncing searchlights off low-lying clouds to illuminate

the battlefield was initiated. 'Artificial moonlight' as it was called would be used extensively by the Canadians in Normandy. Early impressions were favourable as Lt.-Col. Clift noted that "the general opinion is that the use of S[earch] L[ight]s would certainly be of value on a dark night."¹³¹ Once used in combat, 'artificial moonlight' would prove a mixed bag of results, some tragic.

The battalion participated in an interesting rehearsal in late May, 1944. Together with the Fusiliers Mont-Royal, the S. Sask. R. would act as the enemy to British 59th Division in *Exercise Spes*. The politics of nationalism in the exercise instructions severely curtailed the defensive measures that the S. Sask. R. could employ:

For political reasons, which I am unable to reveal to you, I have been forced to order you to withdraw from [the] pos[iti]on [you occupy] not later than 2000 h[ou]rs 15 May and may be compelled to tell you to do so earlier. Despite this you will use your force... with the aggressiveness which has so long been the characteristic of our Army.¹³²

Following the D-Day landings, the battalion bided its time in anticipation of combat. Organised sports and cross-country marches filled the men's days. On 3 July, the battalion embarked for France.¹³³ The officers and men of the S. Sask. R. were about to find out how they stacked up against a tough, resourceful and desperate German enemy. Bitter combat in France, Belgium, Holland and Germany cost the S. Sask. R. 83 officers and 1275 other ranks in total casualties, including 46 officers and 414 other ranks killed.¹³⁴

Conclusion

A great deal can be learned about an army by the way it trains. This chapter is about one battalion amongst many, and may not exemplify the training conducted by the Canadian Army in the Second World War. It is a starting point, however, to a subject that requires more work in order to determine the quality of training in the broader Canadian Army and comparatively with the British and American armies. Further questions remain: Who trained the trainers? What impact did the Canadian School of Infantry and the many training pamphlets published during the war have on unit training? Was there a Canadian way of war established during the long training period leading up to combat? What were the roles of divisional, brigade and battalion commanders during training?

A successful army teaches its soldiers to learn from their mistakes, in combat and during training. It must make use of every possible moment. This chapter suggests that the training afforded to the battalion, and possibly more broadly to 6th Brigade and 2nd Canadian Infantry Division as a whole, was insufficient. It is a testament to the courage of men of the South Saskatchewan Regiment that they achieved what they did in North-West Europe, considering the lacklustre training they received prior to combat.

Notes

- 1 Charles Stacey, *The Canadian Army, 1939-1945: An Official Historical Summary* (Ottawa: King's Printer, 1948), 93.
- 2 A notable international exception is Timothy Harrison Place, *Military Training in the British Army: 1940-1944 From Dunkirk to D-Day*. (London: Frank Cass Publishers, 2000).
- 3 The author would like to thank the Centre for Military and Strategic Studies at the University of Calgary, the Queen Elizabeth II Scholarship Committee and Dr. Patrick Brennan in making this chapter possible.
- 4 Charles Stacey, *Official History of the Canadian Army in the Second World War, Vol. I: Six Years of War. The Army in Canada, Britain and the Pacific*. (Ottawa: Queen's Printer, 1955), 31 and 47. See also, John A. English, *Failure in High Command: The Canadian Army and the Normandy Campaign*. (Ottawa: Golden Dog Press, 1995), 55.
- 5 Stacey, *Six Years of War*. 48.
- 6 Department of National Defence, Record Group 24 (hereafter RG 24), Library and Archives Canada (hereafter LAC), Volume 15259, Serial: 191, South Saskatchewan War Diary, (hereafter SSRWD) 1939/09-1941/03, 1 Sep 1939.
- 7 SSRWD, 5 Sep 1939.
- 8 *Ibid.*, various dates Sep 1939.
- 9 *Ibid.*, 22 and 26 Sep 1939.
- 10 *Ibid.*, 11 Oct 1939.
- 11 There is much more to this multi-faceted topic than simply exuberance in Ontario and dismal enlistment numbers in Quebec in the early months of the war. Besides the story of the S. Sask. R., see for example the difficulties faced in bringing units of the 3rd Infantry and 4th and 5th Armoured Divisions up to strength in 1941 as illustrated in a series of memorandums written by H.D.G. Crerar, then Chief of the General Staff at NDHQ, to the Adjutant General discussing these very challenges. RG 24, National Defence, Series C-1, Reel C-5498.
- 12 Stacey, *Six Years of War*, 75.
- 13 SSRWD, 26 Mar 1940.
- 14 Lt. Col. G. B. Buchanan, *The March of the Prairie Men: A Story of the South Saskatchewan Regiment* (Saskatoon: N.P., 1957), 6.
- 15 *Ibid.*, 5.
- 16 SSRWD, 14 and 15 Sep 1939.
- 17 *Ibid.*, various entries, Winter 1939-40.
- 18 *Ibid.*, 3, 4, 5, 6, 21 and 28 Nov 1939.
- 19 *Ibid.*, 3 Feb 1940.
- 20 *Ibid.*, various entries, Jan 1940.
- 21 Eventually, this intended all-western Canadian brigade would be altered with the Calgary Highlanders shifting to the 5th Canadian Infantry Brigade and the Fusiliers Mont-Royal taking their place. A shortage of French-speaking staff officers scuttled an all-French Canadian brigade.
- 22 Buchanan, 6.
- 23 *Ibid.*
- 24 Calgary Highlanders Regimental Archives, (Hereafter Calgary Highland-

- ers papers,) Military Museums, Calgary, Box 99 (14) 1, *Battalion of Heroes*, File Number 16 (1) – 1, Collective Correspondence, Victor Odlum to the Minister of Defence, 3 Jul 1940.
- 25 Ibid.
- 26 Ibid., 4 Jul 1940.
- 27 Ibid., Minister of Defence to Victor Odlum, 17 Jul 1940.
- 28 Department of National Defence, RG 24, LAC, Volume 14111, Reel T-11344, Serial: 190, Headquarters, 6th Canadian Infantry Brigade War Diary (Hereafter 6 CIBWD), Aug 1940 Appendix XIII, “Notes on Conference following Brigade Tactical Scheme 27th August, 1940.”
- 29 Contrasted to this was the American system of emphasising lessons learned during training. See for example an entire archival box of lessons learned by units of the 29th US Division (including chaplains, military police, and regimental, battalion and company commanders) for *Exercise Duck*. Record Group 407, Records of the Adjutant General’s Office. WWII Operations Reports, 1940-48, 29th Infantry Division. Box – 7495.
- 30 6 CIBWD, Feb 1941, Appendix VIII, Report on Training, 15 Feb 1941.
- 31 SSRWD, 15 Oct 1940 and 13 Dec 1940.
- 32 Ibid., October, November and December 1940 Appendices.
- 33 Buchanan, 7.
- 34 This advance party was sent to England six months previously to receive the latest training information and to generally smooth the process of landing for the rest of the unit.
- 35 SSRWD, 26 Dec 1940.
- 36 Ibid., various entries, Jan 1941.
- 37 Ibid., Jan 1941, Appendix III, South Saskatchewan Regiment – Refresher Course – One Week.
- 38 Ibid., 16 and 31 Jan 1941. See also SSRWD., Jan 1941, Appendix II – Amendment No. 1 to S[outh] Sask[at]chewan R[egiment] M[otorised]T[ransport] Move Instructions No. 1 dated 15 Jan 1941 and South Saskatchewan Regiment M[otorised]T[ransport] Move (Training) Instructions No. 2 dated 28 Jan 1941.
- 39 Nearly 14% of the total manpower in the Canadian Army during the campaign in Northwest Europe was dedicated to supply and transport. This figure is made more significant when considering that only 8% of the manpower was dedicated to armoured forces and slightly more than 15% to artillery. See E.L.M. Burns, *Manpower in the Canadian Army, 1939-1945*. (Toronto: Clarke Irwin and Company Limited, 1956), 17.
- 40 Statement regarding Canadian troops in England around that time by Lieut.-Gen. A.G.L. McNaughton in English, 63.
- 41 Buchanan, 10.
- 42 See SSRWD, Jan 1942, various entries.
- 43 Department of National Defence, Directorate of History and Heritage, Historical Section (G.S.) Army Headquarters Report No. 123 – Report on Battle Drill Training, 31 August 1944, Sections 1-5, 1-2.
- 44 Terry Copp, *Fields of Fire: The Canadians in Normandy*. (Toronto: University of Toronto Press, 2003), 18.
- 45 English, 118.
- 46 English, 111. See also, David Bercuson, *Battalion of Heroes*. (Calgary: Calgary Highlanders Regimental Funds Foundation, 1994), 35-40.
- 47 Terry Copp, *The Brigade* (Stoney Creek, ON: Fortress Publications, 1992), 25.
- 48 English, 111.
- 49 Copp, *The Brigade*, 30
- 50 Ibid., 29
- 51 See Paddy Griffith, *Battle Tactics of the Western Front*. (London: Yale University Press, 1994), 99-100. Griffith also notes that the term ‘battle drill’

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- describing this type of training as having being coined as early as 1917-18 by either Captain Basil Liddell Hart or Maxse.
- 52 Calgary Highlanders Papers, re-printed from the original by the 47th British Division Battle Drill School, *Battle Drill and Its Evolution (1941)*, 1.
- 53 Ibid.
- 54 Author's emphasis, see 6 CIBWD, Oct 1943, Appendix VIII, 6 Canadian Infantry Brigade Training Directive No. 1, 26 Oct 1943.
- 55 English, 118.
- 56 Ibid., 107.
- 57 Ibid.
- 58 Walter Steven, *In This Sign*. (Toronto: The Ryerson Press, 1948), 34.
- 59 English., 114.
- 60 When historians do address morale, they tend to focus only on combat morale. For a notable international exception see, Jonathan Fennell, *Combat and Morale in the North African Campaign: The Eighth Army and the Path to El Alamein*. (New York: Cambridge University Press, 2011), 219-240.
- 61 SSRWD, 5 Nov. 1939 and SSRWD, Regina Detachment, 16, 17, and 18 May 1940.
- 62 SSRWD, Jul and Aug, 1942, Copp, *The Brigade*, 38 and George G. Blackburn, *Where the Hell Are the Guns?* (Toronto: McClelland & Stewart, 1997), see Chap. 56 throughout.
- 63 SSRWD, 22 Mar 1941.
- 64 Ibid., 16 Jul 1943.
- 65 See, SSRWD, Feb. 1940, Appendix III, HQ "Coy," Syllabus of Training for the week ending 2 Mar, 1940, SSRWD, May 1941, Appendix III, Syllabus of Training for week commencing 19 May 1941, HQ Company, 19 May, 1941 and SSRWD, Nov 1942, Appendix III, Training Program, South Saskatchewan Regiment for week ending 14 Nov 1942 and SSRWD, 22 Apr 1944.
- 66 Department of National Defence, Directorate of History and Heritage, Historical Section (G.S.) Army Headquarters Report No. 41 – Movement of Second Canadian Division to South Coast. Pages 1 &2, Section 3.
- 67 See SSRWD, July 1941-May 1942.
- 68 SSRWD, 6 Jan 1942.
- 69 Ibid., 12 Jan 1942.
- 70 Ibid., 29 Jan 1942.
- 71 Buchanan, 14.
- 72 SSRWD, Jun 1942, Appendix X, South Saskatchewan Regiment Battalion Training Programme 5 Jun 1942.
- 73 Brian Villa, *Unauthorized Action: Mountbatten and the Dieppe Raid* (Toronto: Oxford University Press, 1989), 12, Robin Neillands, *The Dieppe Raid: The Story of the Disastrous 1942 Expedition* (London: Aurum Press, 2005), 168 and Stacey, *Six Years War*, 334.
- 74 Stacey, *Six Years War*, 334 and 339.
- 75 Buchanan, 14.
- 76 SSRWD, Appendix VIII, 6 Canadian Infantry Brigade Training Instructions, Training Period – 1 to 31 August 1942, dated 22 Jul 1942.
- 77 Buchanan, 18.
- 78 SSRWD, Jun 1941, Appendix III, Syllabus of Training for Week Commencing 9 Jun 41, HQ Company, 9 Jun 1941; Ibid., Mar 1942, Appendix III and Mar 1944, Appendix IV, South Saskatchewan Regiment, Training Syllabus for Week Ending 18 Mar 1944, Training Program, "B" Company for week ending 21 Mar 1942; and RG 24, vol. 16785, 2nd Canadian Base Reinforcement Battalion, April 1945 Training Syllabus.
- 79 See John Rickard, *The Politics of Command: Lieutenant-General A.G.L. McNaughton and the Canadian Army, 1939-1943*. (Toronto: University of Toronto Press, 2010), 128-168.
- 80 Although *Spartan* was held in March, 1943 the Canadian Army would not

- be afforded the opportunity to participate in further large scale exercises in Great Britain prior to the invasion of the continent. To be fair, few officers capable of effectively fighting a division were available in the rapidly expanding, inexperienced Canadian Army at the time.
- 81 SSRWD., Mar 1943, Appendix IV, *Exercise Repeater*, South Saskatchewan Regiment Training Instruction No. 2, 17 Mar 1943.
- 82 SSRWD., 29 Mar 1943.
- 83 Department of National Defence, *Infantry Training: Part VIII -- Fieldcraft, Battle Drill, Section and Platoon Tactics* (Ottawa: King's Printer, 1944), Chap. 4, Section 26, Serial 103
- 84 Ibid.
- 85 SSRWD., Dec 1943, Appendix VII, *Exercise Crescendo*, Notes for Preliminary Explanation, 2 Dec 1943.
- 86 Ibid.
- 87 Ibid., 27 and 28 Jan 1944.
- 88 Ibid., Jan 1944, Appendix VII, South Saskatchewan Regiment *Battle Rehearsal Zip*, General Instructions, undated.
- 89 Stacey, *Six Years of War*, 253.
- 90 6 CIBWD, Mar 1944, Appendix VII, 6 Canadian Infantry Brigade *Exercise Curl*, 19 Mar 1944.
- 91 SSRWD, 27 Mar 1944.
- 92 Further evidence against Stacey's contention is a handwritten notice in the battalion war diary by Lt.-Col. Sherwood Lett ordering all officers of the battalion to undertake physical training at 0645 hours daily prior to regular training beginning at 0815. See SSRWD, Dec 1941, Appendix III, Syllabus of Training for Week Commencing 3 December 1941, HQ Company, 3 Dec 1941
- 93 SSRWD, Oct 1942, Appendix V, *Exercise Panther*, 20 Oct 1942.
- 94 See English, 151 and SSRWD, Mar 1944, Appendix IX, Index I, 6 Canadian Infantry Brigade, *Exercise Hike*, 22 Mar 1944. Young only had a few months in command of the Brigade before seeing combat, following the departure of his predecessor, Brigadier Gostling, and judging by battle results could have used the training. See Copp, *Fields of Fire*, 181.
- 95 SSRWD, Appendix VIII, South Saskatchewan Regiment, General Instructions, *Battle Rehearsal Shamrock*, 14 Mar 1944.
- 96 Training lacking spontaneity was not a solely Canadian problem, however, as spontaneous military exercises for all warring nations inherently lacked realism and vice versa.
- 97 SSRWD, 24 May 1943.
- 98 Ibid.
- 99 See SSRWD, Aug 1943, various entries and 6 CIBWD, Aug 1943, Appendix XIX, *Exercise Pickaxe*, Exercise Instructions, 1 Aug 1943.
- 100 6 CIBWD, Aug 1943, Appendix XIX, *Exercise Pickaxe*, Exercise Instructions, 1 Aug 1943.
- 101 SSRWD. Appendix VII, Intelligence Log, Form "B", *Exercise Pickaxe*, Sheet No. 10, 12 Aug 1943.
- 102 The similarities between these exercises and *Atlantic* (where the battalion, in its first combat action since the devastating raid on Dieppe, lost 66 killed, 116 wounded and 26 PWs) are indeed eerie, with the Sherbrooke Fusiliers being the supporting armour in all three. It has been correctly noted that following the debacle of *Atlantic*, with the battalion reconstituted, a more-successful attack was put on Rocquancourt as part of Operation *Totalize* though with very heavy casualties (16 killed and 42 wounded.) See Terry Copp, *Fields of Fire*. (Toronto: University of Toronto Press, 2003), 202 and C.P. Stacey, *Official History of the Canadian Army in the Second World War. The Victory Campaign: The Operations in*

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- Northwest Europe, 1944-1945.* (Ottawa: The Queens' Printer, 1960), 220.
- 103 See for example, SSRWD, Appendix III, Training Program, "B" Company for week ending 21 Mar 1942 and 6 CIBWD, Jun 1942, Appendix VIII, 6 Canadian Infantry Brigade Training Syllabus, 6 Jun 1942.
- 104 Blackburn, 123.
- 105 SSRWD, 11 Mar 1942.
- 106 As quoted in, Peter R. Mansoor, *The GI Offensive in Europe: The Triumph of American Infantry Divisions, 1941-1945.* (Lawrence: University Press of Kansas, 1999), 19.
- 107 Ibid.
- 108 6 CIBWD, Jan 1944, Appendix V, 6 Infantry Brigade Training Directive No. 3, 27 Dec 1943.
- 109 SSRWD, 1-12 Jan 1944 and Jan 1944, Appendix V, Infantry Battalions of Follow-up Divisions, South Saskatchewan Regiment Training Programme – 2-11 Jan 1944 and Buchanan, 23.
- 110 6 CIBWD, Jan 1944, Appendix V, 6 Canadian Infantry Brigade Training Directive No. 3, 27 Dec 1943.
- 111 Ibid.
- 112 Ibid.
- 113 Ibid.
- 114 Ibid.
- 115 Ibid. Gostling most likely was also reacting to directives passed down from Canadian High Command to ensure that the men were 'fighting fit and fit to fight.' How they could not have been after years of training is puzzling as was the decision, "a few months before D-Day...to emphasize the basics." English, 151-152.
- 116 Record of Conversation between Lt.-Gen K. Stuart and Brigadier G.S.N Gostling at HQ 2 Cdn Div on 24 Feb 44. RG 24, National Defence, Series C-2, Volume 12215, Reel T-17508. Gostling argued his case to the degree that Stuart was forced to threaten him with a return to Canada if it did not cease. It has yet to be determined if his successor, Brigadier Young, fought the brigade successfully. In the same conversation Stuart told Gostling there was a great deal of doubt that he was capable of doing so.
- 117 Another example was the case of Hamilton Roberts, the Commanding Officer of 2nd Canadian Infantry Division at Dieppe. He retained command of the division despite the debacle at Dieppe, only to lose it in the aftermath of *Exercise Spartan* in March, 1943 where his tactical performance was severely criticised.
- 118 Stacey, *Six Years of War*, 252-253.
- 119 6 CIBWD, Mar 1944, Appendix V, 2nd Canadian Infantry Division, *Exercise Step*, Exercise Instructions, 22 Mar 1944.
- 120 6 CIBWD, Apr 1944, Appendix V, Intelligence Log, Form "B", *Exercise Step*, Sheet 11, 3 Apr 1944.
- 121 Ibid. and SSRWD, 3 Apr 1944.
- 122 See Stacey, *Six Years of War*, 252.
- 123 SSRWD, 13 Mar 1944.
- 124 Ibid., 22 Apr 1944.
- 125 Buchanan, 23.
- 126 SSRWD, 25 Apr 1944.
- 127 Tragically, Worthington would later be killed and his unit decimated as part of the confused fighting in *Operation Totalize*.
- 128 SSRWD, 28 Apr 1944.
- 129 Ibid.
- 130 Ibid., 1-3 May 1944
- 131 6 CIBWD, May 1944, Appendix IX, South Saskatchewan Regiment, Use of Searchlights, 19 May 1944
- 132 SSRWD. Appendix V, 6 Canadian Infantry Brigade, *Exercise Spes*, Directives to the Commander of German Force, undated.
- 133 SSRWD, 3 Jul 1944.
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Unsung Heroes: Canadian Civil Affairs in Northern France

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As Allied soldiers, sailors and airmen fought for a toehold on the shores of Northern France on 6 June 1944, Civil Affairs officers began conducting a wholly different type of campaign. This was one fought not with bullets and brawn, but with supplies and knowledge under a directive to provide relief to the beleaguered and destitute civilians of war-ravaged Europe. Civil Affairs was a branch of the Army responsible for ensuring that the civilian population in Europe did not interfere with military operations.¹ It was in Northern France that the men of Civil Affairs, First Canadian Army, received their trial by fire, dealing with the movement and relief of refugees and the reestablishment of law, order and infrastructure. By absorbing the lessons from every experience, they developed the skills necessary to handle the myriad problems they were to face in Northern European towns and cities. Indeed, the recovery of Boulogne, Calais and Dunkirk marked significant milestones for the development of Civil Affairs in the Canadian Army. These operations were highly successful in limiting civilian casualties and preventing civilian impediment of military operations. In doing so, they established a Civil Affairs doctrinal template for future urban operations in North-West Europe.

Civil Affairs had long been an important part of the modern British Army, and this was especially so during the Second World War, when the branch sought to address civilian problems in Africa, the Mediterranean Theatre, and finally in North West Europe.² The primary objective of Civil Affairs working in liberated countries was to restore order, help re-establish local governments, and then co-operate with them.³ In France the work of Civil Affairs was complicated by local concerns about control. Leader of the Free French General Charles De Gaulle, for example, worried that Civil Affairs would infringe on French sovereignty, and therefore Civil Affairs was not supposed to *seem* like a military government even though in practice, Civil Affairs' objective was "to exercise administrative control and supervision...in order that the civil machinery may be set going as early as possible and in such a way as to benefit the allied war effort."⁴ In North West Europe then, Civil Affairs had also to succeed at diplomacy

and politics, in addition to aiding and cooperating with local officials and populations.⁵

Equally important to Civil Affairs operations in Europe was refugee control. The Allies feared that large mobs of refugees would impede military operations like they had in France in 1940. Civil Affairs was tasked with making sure this was not the case again in 1944.⁶ To do so, Civil Affairs was to liaise between the civilian population and the military; and to limit disease, disorganization and general unrest in order to prevent civilian impediment to the activities of the fighting troops.⁷

Civil Affairs grouped together roughly 240 officers who were then sub-divided into detachments, which became the basic working unit of the Civil Affairs branch. Detachments included between ten and sixteen officers who specialized in various areas (administration, public safety, supply, law, labour, public health, etc.), several other ranks, as well as the necessary equipment and material. After July 1944, detachments were divided into two types: "spearhead" and "static". Spearhead detachments followed division headquarters into newly liberated territory to determine the primary problems and provide immediate and short term relief. With emergency measures in place, Static detachments established their base of operations to coordinate a long term commitment to local issues. Detachments were typically commanded by a Major, and groups by the Senior Civil Affairs Officer (SCAO) who commonly held the rank of Lieutenant Colonel. Civil Affairs officers were also attached to corps and army headquarters in the form of general staff officers (GSO), often at the rank of Lt. Colonel. In the War Office, the SCAO was Major-General P. Kirby, the senior civil affairs officer in the Allied armies. The highest ranking Canadian Civil Affairs officer was Brig. General W.B. Wedd, appointed SCAO of First Canadian Army in February 1944. As one historical officer noted, "Brigadier Wedd, in addition to his military qualifications [D.S.O., M.C., E.D.] possessed a background of experience in civilian life...He had for some years been the European representative of the Massey-Harris company, the largest agricultural exporter in the British Empire, and many years residence in Europe had made him familiar with the language and characteristics of the people in the countries through which the Canadian Army was to pass."⁸

Training for the men intent on entering Civil Affairs was conducted in England at the Civil Affairs Staff Centre in Wimbledon, but in December 1943 the Royal Military College in Kingston opened a preparatory course for Canadian candidates. Most of the Canadian candidates were between the ages of 35 and 50, rendered available for "other than normal military duties"

because of age or a lack of ability to command, etc.⁹ The Dean of Arts from the University of Alberta, Professor G.M. Smith, was appointed Director of Civil Studies and in conjunction with Major T.F. Gelley, a member of the RMC directing staff, and in liaison with administrators at the Wimbledon school, set about organizing the curriculum. The college went on to complete three full courses and a partial post-graduate course in Civil Affairs. 141 officers came through the Canadian Civil Affairs Staff Course. By August of 1944, however, demand for Civil Affairs officers became so great that the course was disbanded and all of its students transferred overseas for use.

Training, although sophisticated, was by no means wholly sufficient in preparing Civil Affairs officers for the problems that they would face in Northern France. When Civil Affairs units landed in France on D-Day, they began to re-establish a fully functioning civil administration. This difficult assignment was complicated by the fact that many of the officials in the pre-D-Day French administration were Vichyites with pro-Nazi sympathies, presenting Civil Affairs officials with a complicated vetting process. The lessons of Italy had shown that the dismissal of every official who worked in the pre-liberation government led only to serious administrative gaps, thus it was important at every level to consider which officials were Vichyites and which were for an independent France but had chosen to stay and attempt to work within the German occupation system.¹⁰

The vetting process of officials within France's political sub-divisions was aided by De Gaulle's *Comite Français de Liberation Nationale* (CFLN) who had produced a list of replacements for all major positions throughout France.¹¹ Almost all senior French administrative officials, regional commissioners, prefects and sub-prefects, were to be replaced upon liberation, while at the lower administrative levels many were to remain in their position. However, the relationship between Civil Affairs and the CFLN was complicated by the deteriorating relationship between Charles De Gaulle, American President Franklin D. Roosevelt and British Prime Minister Winston Churchill. As diplomatic relations became strained it was imperative that the Allies appeared to be not merely custodians of the Gaullist regime, placing De Gaulle in power immediately upon liberation. They had to at least present a picture to the French people that the choice of government was to be theirs. As the SHAEF handbook for Civil Affairs in France noted, "The delicacies of the political situation which [we] will obtain lends additional emphasis to this point. The utmost care must be taken that no impression is given which may be construed as forwarding the political interests of any particular group, faction or party."¹² However, the extreme popularity of De Gaulle was

recognized by the Allied leadership, and his officials on the ground were already working closely and effectively with many Civil Affairs officers, thus his ascension to the leadership of the country was thought by many to be a foregone conclusion.

Caen was Civil Affairs' first major test in an urban setting. As Major Reid wrote, "No account of Civil Affairs in France would be complete without some reference to Caen which, being the first town to present any serious problems, tested many theories and taught many lessons which were to influence and guide the conduct of Civil Affairs throughout the entire campaign."¹³ The city of Caen was located roughly twenty kilometres from the Normandy beach-head, and was originally slated to be captured on D-Day. As a communication hub near the landing zone, the control of Caen helped German units block Allied progress further inland, making Caen a decisive battle ground for both sides. Stiff German resistance meant that it was a full month later, on 9 July, before the first Allied units entered Caen, and another ten days before the city was free of German troops. Vicious street-fighting meant significant losses were taken by both sides. Approximately two-thirds of the city was completely demolished with half of its residents rendered homeless.

Leading the relief effort was Canadian Civil Affairs Detachment 201, which entered Caen on 9 July and was followed over the next few days by advance elements of detachments 208, 209 and 219. By 12 July full detachment compliments were established in the city and, while fighting still raged throughout the area, Civil Affairs officers were already at work. According to a Canadian Army report, "The civilian authorities had provided an efficient service for clearing readily-available bodies out of ruins, but it was estimated that 600 bodies still remained buried under debris. These, however, were so deeply buried that they were not an immediate source of danger to health."¹⁴ Of more immediate concern were the heavily damaged water distribution system and lack of electrical power which prevented the use of pumps, leaving the city without running water or a working sewage system. Debris in the streets greatly hampered the movement of supplies to areas in need, and severed the eastern and western ends of the city.¹⁵ The limited movement of supplies was a serious concern for military planners, as it was estimated that roughly 20,000 to 25,000 people had to be fed in Caen in the first days of liberation.¹⁶

Consequently, the temporary housing arrangements made for the displaced people of Caen was rather unsanitary but surprisingly, the medical situation was not as bad as predicted. "The French services for looking after

the wounded in the hospitals...were working admirably when Civil Affairs entered the town on 9 July."¹⁷ Civilian casualties were regularly evacuated, keeping hospital beds empty for emergency use. There were some shortages of medical supplies, but none of the sixty doctors living in Caen were reported evacuated or killed.

The inhabitants of Caen gave the Allies a mixed reception. Although glad to be liberated, the extensive bombing of the city understandably tempered the enthusiasm of the natives. Perhaps overly optimistic, one report on Caen read, "The morale of the population was good. Most inhabitants do not understand the reason for severe Allied bombardment of the city...However, only among those who have lost immediate relatives does resentment occasionally appear."¹⁸ Mr. Daure, the Prefect of Caen, reported candidly to one Civil Affairs officer that, "The strength and efficacy of the bombardment made some people compare it to the well-known methods of the enemy."¹⁹ Two leading religious officials lamented, "We have suffered an undeserved fate. Apart from the grievous sufferings of the population, many old buildings and churches have been destroyed..."²⁰ However, all reports suggest that, overall, the population welcomed liberation, as the Prefect eagerly reported to the Allies "there is not the slightest doubt that the people are delighted to be liberated."²¹

The primary objectives for Civil Affairs detachments in Caen were to move the homeless population out of the city and away from the fighting as quickly as possible while at the same time attempting to restore public services. The movement of refugees was a two-phase operation. The first phase dealt with civilians situated on the north bank of the Orne River; the refugee situation was stabilised by 16 July. The second phase involved civilians on the south bank of the Orne and lasted from 19 July to 29 July. During both phases, small pockets of German soldiers continued harassing Allied troops while heavy fighting raged on the south bank and beyond. Civilians were not fully out of danger until they were well away from the combat zone. One of the more tragic incidents occurred on the night of 13/14 July when heavy German shelling struck a mass evacuation, causing heavy casualties amongst the civilian population attempting to flee the city.

An after-action report on Caen written by Brigadier Wedd from Civil Affairs First Canadian Army HQ, detailed the lessons learned during the operation. "Since this was the first attempt at large scale control of refugees in France, it is obvious that mistakes were inevitable."²² These operational mistakes, however, provided the opportunity to learn significant lessons, especially in refugee control. First, "unless military necessity so required, do

not make refugees of people who are perfectly willing to stay put."²³ Once the refugee problem began to stabilize, there was a tendency for Civil Affairs officers to order the evacuation of all persons living in designated city shelters. As the Civil Affairs report on Caen stated, "Sleeping in a shelter does not make a refugee of a person..."²⁴ Some shelters provided more than adequate protection and once over-crowding was stymied, these shelters were considered sufficient, sanitary living quarters for the interim period. In certain detachment jurisdictions all persons inhabiting shelters were considered refugees and forced to evacuate, unnecessarily increasing the number of refugees being moved out of the city. This put a strain on the available transportation as well as over-stretched supervision personnel. Furthermore, the increasing numbers of unnecessary refugees congested pre-set evacuation routes, slowing down the entire evacuation process as well as increasing the chance of civilian casualties from enemy bombardment. In order to prevent unnecessary refugees, a classification system was created, based on the "state of homelessness, willingness to evacuate, and whether or not they have a definite destination in mind."²⁵ The classification of civilians under strict guidelines was intended to show Allied willingness to respect, within reason, the wishes of the local inhabitants.

The report also called for the establishment of a consistent policy on refugees throughout the area of operation. In Caen, Civil Affairs officers had ordered compulsory evacuation in some areas and voluntary evacuation in others, creating considerable confusion. Furthermore, the report demanded that evacuations not begin until all detachments were thoroughly organized. The urgent need immediately to remove civilians from Caen appeared to override any organized, official plan causing more confusion and chaos than was necessary.

Finally, one of the most important lessons discussed in the Caen report was the need for one officer, with support staff, to be placed in charge of the entire refugee operation. Although the whole operation was commanded by a SCAO, the specifics of the refugee problem were left to each detachment to sort out, causing operational inconsistencies between detachment boundaries. As one report read, "Place one single officer in charge of refugee work and movement control. Do not override his authority, do not give him staff which he does not require, and let him delegate as much as possible of his work to local authorities."²⁶ Furthermore, this officer would be in charge of obtaining from all detachments under his command a complete list of available accommodations in each detachment's operational area prior to liberation so as to maximize the efficient distribution of refugee groups.

Another major problem encountered by Civil Affairs officers became apparent in the weeks after the operation for Caen was completed, when refugees began making their way back to their homes, regardless of the warnings and bulletins issued by military authorities. These waves of uncontrolled refugees posed serious threats to military security, communication and supply lines. Civil Affairs officers dealt with this return migration problem almost identically to the initial waves of refugees moving away from urban centres. Civil Affairs and French Liaison Officers (LO) distributed "posters, and personal appeals to the civilian population...and also in some cases [took] more drastic action against those who disregarded such instructions."²⁷ This mixed approach of education and coercion stemmed the flood of returning refugees until their numbers were "restrained to a number which did not materially interfere with Army traffic."²⁸

Although good for military operations, acts of refugee movement-control created tension between desperate civilians and the military personnel preventing their return. Often groups of refugees were forced to move through fields adjacent to the main roads creating nomadic tent cities, as refugees carried with them "most of their worldly possessions. They came with huge wagons, all manner of carts, bicycles laden with bedding, clothes and bottles of cider. Many even attempted to bring cattle with them."²⁹ The lack of available transport increased the problems facing refugees and put further strain on military resources. As one officer noted, "The problem of transport, is, at the present time, the only serious one caused by refugee movement."³⁰ Some groups of refugees were uncovered, hiding in various areas throughout the battle zone. For instance, a group of 3,000 refugees was discovered living in grottoes near Grande Couronne just south-west of Rouen. Most were stranded without food or water. Detachments were forced to alleviate this situation by telling refugees, "to send representatives to the nearest Divisional Collecting Point to obtain food, milk and water."³¹ The provision of supplies to these refugee groups was not only the humanitarian choice, but reduced the likelihood of civil unrest hampering military movement.

After Caen a Civil Affairs detachment was to be allotted to each Corps on the basis of one per division, thus creating 'spearhead' detachments that would work closely with division headquarters (HQ). Once initial civilian support had been provided, spearhead detachments would be relieved by 'static' detachments, coordinated between Corps and Army HQ. This allowed for the spearhead detachments to move forward with their respective division. "Each division got to know and to depend upon its own particular 'spearhead' detachment. The members of the detachment understood and

were able to deal with the problems and personalities in their respective areas or divisions."³²

Ultimately, the arrival of Allied soldiers in Caen created a chaotic scene of civilian and military interaction. The primary responsibility of the Civil Affairs branch was to prevent the civilian population from impeding military operations. For the most part this was deemed successful, yet significant numbers of civilians were killed and injured, and many more were needlessly displaced. The lessons derived from the Caen operation reinforced the need for the removal of civilians from the battle space prior to the commencement of a military operation in order to limit collateral damage. Furthermore, Caen provided valuable lessons on the prevention of civilian casualties from post-combat issues like food, water and medical shortages. These lessons created a solid foundation of much needed experience for the men of II Canadian Corps Civil Affairs.

Throughout July, II Canadian Corps had been fighting under the command of Second British Army. This changed on 31 July, when for the first time First Canadian Army Headquarters became operational in a theatre of war. The experienced Civil Affairs staff at II Corps, and now at Army headquarters, would prove invaluable to Harry Crerar's army headquarters in the coming months. By the late summer of 1944 the Allies had broken free of the Normandy bridgehead and were moving rapidly towards the River Seine, an advance that began overwhelming the already stretched supply system of General Bernard Montgomery's 21st Army Group. On 4 September 1944 the British 11th Armoured Division captured Antwerp, which had a port big enough to alleviate the strain on the Allies' supply system. All that remained was for the British to clear the German defences from the Scheldt Estuary, which fed into Antwerp. But Montgomery, with eyes on the Rhineland and hungry to end the war by the end of the year, chose instead to turn towards Germany immediately. Had the bridge at Arnhem not been too far, his decision would have been deemed a worthy risk; but the bridge was too far, and the consequences of his decision were costly for the Allies in general, and the Canadians in particular, because at this point Montgomery surmised that the capture of a series of coastal ports along the Northern French coast could help alleviate, temporarily, the logistical problems plaguing his units. General Crerar's army, situated on the left, coastal flank of the Allies' advance, was ordered to hurry towards the Scheldt, and along the way capture the series of smaller coastal ports in France and Belgium, including Boulogne, Calais and Dunkirk, to help alleviate the supply problem. These coastal cities during the years of German occupation had been turned into fortresses. Gaining control

of these fortified garrisons meant brutal street fighting that put thousands of civilians in danger. The attack on the channel ports was allotted to General Guy Simonds' II Canadian Corps; their first major test was the liberation of Boulogne.

The Civil Affairs operation at Boulogne established a successful method of reducing civilian casualties through mass evacuations while also cementing a doctrinal formula for future Civil Affairs operations in urban areas. The success of the Boulogne operation, codenamed Operation Wellhit, was a direct result of the reforms implemented and lessons learned after the Caen operation. At first, Civil Affairs officers sought to remove only civilians living within the city of Boulogne itself. However, there was suspicion of a serious security leak outside the city, prompting 3rd Canadian Infantry Division to evacuate "a belt some three to four miles deep encircling the city."³³ The evacuation was conducted in conjunction with French authorities including officials of neighbouring communes, the Mayor of the town of Montreuil-sur-Mer, the FFI (the French Forces of the Interior, a large, loosely knit resistance group) and the Secours National (a civilian organization intended to aid civilians during wartime). Civil Affairs officers were thus working closely with French civil and para-military authorities in carrying out Boulogne's evacuation scheme.

The plan called for a general evacuation of the area between the Wimereux River to the north, the Boulogne Forest to the east, and what is known as the Outreau Peninsula to the south as far as the village of Ecault. This was a large area and four major collection points for refugees were established. These points were located near significant villages and towns: Bellebrune to the north-east of Boulogne, Wirwignes to the east and two to the south-east near the small village of Zeliq. The evacuation area was divided into two zones, A and B; the northern boundary for Zone A consisted of the Wimereux River with its southern boundary consisting of the Boulogne-Desvres road, running west to east through the centre of the city. Zone B incorporated the area south of the Boulogne-Desvres road all the way to the sea.³⁴ Thus, refugees from Zone A were directed towards collection points near Bellebrune and Wirwignes, while refugees from Zone B were directed towards the two collection points south-east of the city. From these collection points, refugees were transported to Montreuil via train and military vehicle convoys, roughly forty kilometres south of the city of Boulogne. Once in Montreuil, they were handed over to French civilian authorities and either housed by the town of Montreuil and its outlying communes or allowed to go and stay with relatives elsewhere until the fighting moved on. Civilians

were notified of the evacuation scheme through leaflets printed by 3rd CID. These leaflets were either dropped from planes over German occupied areas or personally handed out in Canadian occupied areas. These notices would often find their way into the hands of civilians in enemy occupied territory, thus notifying them of the intended scheme. The leaflet production was overseen by Deputy Assistant Adjutant General (DAAG) Major Keith of 3rd CID and distribution was to be the responsibility of local unit commanders and their troops.

There were, in practise, two evacuations in and around Boulogne. The first focused on the evacuation of the outlying areas of the city, essentially the Canadian front lines. The second evacuation concerned those civilians immediately within the city limits. These civilians were allowed to leave by the German commander, Lt. General Ferdinand Heim, who arranged a temporary truce with the Canadians in early September to carry out the evacuation of the civilians from the city.³⁵ Thus the Canadian portion of the Boulogne evacuation scheme was in essence the second phase in a two phase operation, the first being carried out by the Germans.

The Canadian refugee operation offers a valuable instance of civil-military cooperation as both Canadian officers and French civilian authorities worked closely together to ensure success. As Lt-Col. Walker wrote optimistically prior to the attack, "It seems to me that there is every reason to think that this scheme should function easily and effectively. I think it is a first-rate example of the French looking after themselves and we assisting them."³⁶ Although the evacuation plan was intended to remove the majority of civilians from the battle space, Civil Affairs officers recognized that many civilians would choose to remain in their homes. Furthermore, there was a fear that the Germans might prevent the civilians from leaving, so to use them as human shields. Lt-Col. Ernest Cote, Army Adjutant and Quarter Master General for 3rd CID, was reported to have been "very much concerned about the position of [civilians] in Boulogne and action to be taken to care for them on entry into the town. He felt that the reputation of the [division] depended in considerable measure on the way in which [civilians] were handled."³⁷ Therefore, Civil Affairs officers devised a simple yet realistic plan for ensuring that these civilians were cared for the minute the fighting seized.

The first step was to develop an accurate picture of Boulogne in regards to the three primary concerns of Civil Affairs detachments, medical supplies, water, and food. With the help of the French liaison officer, Commander Mengin, Civil Affairs officers knew that the food situation in Boulogne was becoming more critical every day, especially with respect to milk supplies for

younger children. As well, medical supplies were short, and the water situation was urgent. Cote felt that in order to be quickly effective the forward Civil Affairs detachments needed to enter Boulogne "practically with the leading troops and be able to state to [civilian] authorities that feeding, water, [medical] care would be available the same day."³⁸

For water, Cote called for the delivery of 20,000 gallons in the first 12 hours, followed by 50,000 gallons every 24 hours after the initial supply. For this supply, Cote requested transport reinforcement from the corps level to assist divisional transport in carrying out this scheme. Cote also ordered that enough food rations be provided for the estimated remaining population for a period of three days, when the normal supply routes from the countryside could be re-established. Furthermore, due to the "advanced state of undernourishment and the condition of the children, the rations should contain considerable extra milk and soft foods..."³⁹ Medical supplies, consisting primarily of bandages, anti-toxins (for diphtheria and typhoid) as well as anaesthetics were shipped. Although there was only one doctor attached to the detachment 214, Cote felt that the delivery of medical supplies should be supplemented with an English Red Cross team as well as a French surgical unit in order to increase the number of trained medical personnel in the city. One report noted, "There have been no serious epidemics of communicable diseases and with few exceptions hospital beds are adequate for civilian needs. Indigenous medical supplies are still available only in limited quantities, shortages being met by distribution of Civil Affairs supplies and equipment."⁴⁰

The procurement of supplies by Civil Affairs detachments was considerably aided by various French government and non-government organizations. Although during military operations supply requests were handled by the headquarters of the formation commanding the military zone, once serious operations moved forward requests were to be made by French regional authorities directly to their superior administrative body. These requests, which would be consolidated into bulk orders, would in turn be handled by commanding officers of Lines of Communication who would draw the stores from Civil Affairs Inland Depots (CAID) or pass the larger requests up the chain of command. Officers of Civil Affairs detachments would act as supply advisers to local French officials and not be directly involved in supply requests. By September the French authorities already, "computed requirements for all supplies for the months of October and November."⁴¹ Because of this system, and the cooperation between French civilian and military officials, supply problems throughout most of France were negligible, even

in areas that were still experiencing combat. However, the lack of transportation was still “the limiting factor in the resumption of normal food distribution...”⁴² In an attempt to combat this problem, “Certain French Transport Companies have been formed. These [were] equipped with British vehicles and are manned and maintained by French military personnel administered by the French Military Authorities.”⁴³

The results of the evacuation plan and the preparation for civilian needs in Boulogne was a major success. Casualty rates were extremely low and Civil Affairs detachments provided basic needs immediately upon entering the town. There were no reported civilian casualties once combat stopped, and the evacuation of large numbers of civilians kept the casualty rates low.

While troops of 3rd Canadian Infantry Division assaulted Boulogne, plans were already being drawn up for an attack on the larger city of Calais. Civil Affairs plans were very similar to those from Boulogne and spoke to the success with which they had achieved their operational objectives with little collateral damage. It was imperative for the Allies to occupy Calais in order to eliminate German use of the large naval guns entrenched around the city and towards Cap Gris Nez. This would free up Boulogne’s port facilities as well as giving added protection to channel shipping.

The assault on Calais commenced on 16 September, spearheaded by Brigadier Spragge’s 7th Canadian Infantry Brigade. Spragge’s troops fought while 20,000 civilians remained in the city. Heeding the lessons from Caen and Boulogne, operational plans were drawn up for the evacuation of these civilians into the countryside. Unlike Boulogne, however, fighting began in Calais prior to this scheme being carried out. German Lt-Col. Schroeder refused to allow the civilians to leave the city. For much of the operation, civilians huddled in their houses, cellars, shelters, and trenches. It was not until late September, when the German garrison seemed near defeat, that Schroeder allowed the 12,000 Calais civilians to leave. Schroeder intended to use the civilian evacuation as a tool to disrupt the Canadian attack, forcing military resources to be redirected towards civilians rather than hostilities. According to the 7th Division War Diary, Brigadier Spragge, “was more than slightly put out by the whole affair and cheerfully would have killed Schroeder if he could have got his hands on him.”⁴⁴ Fortunately, the now experienced Canadian Civil Affairs thwarted Schroeder’s plans, and the civilian evacuation was conducted smoothly. Collection points were established at various intervals surrounding Calais in order better to coordinate the move of refugees to the country side.

Unlike Boulogne, the food situation in Calais was not deemed critical, but the water supply was. Major Alker's spearhead detachment entered Calais and quickly established a clean water supply. Medical supplies were considered short, but could be quickly supplemented. Overall the evacuees were swiftly removed from the battle space and distributed into the country side. Spearhead detachments were already close on the heels of Canadian troops and when the German garrison surrendered on 30 September, Civil Affairs officers were already working on re-establishing water and electricity while food and medical supplies were being moved into the city.

Dunkirk was the final port town along the coastal route of the Canadian advance. Soldiers of the 2nd Canadian Infantry Division made several small-scale assaults but found stiff resistance. Operationally—if not symbolically—Dunkirk lacked the significance of Calais and Boulogne, so it instead was surrounded and masked. In early September the Germans attempted to negotiate with General Foulkes, GOC 2nd Division, to allow for 20,000 civilians to evacuate. Debate ensued at 21st Army Group Headquarters between senior Canadian and British officers on whether or not to allow the evacuation. That the evacuation was proposed by the commander of the German garrison led most to believe that an evacuation was likely somehow to benefit the Germans at Canadian expense. Simonds, for one, was against the evacuation “on Security grounds.”⁴⁵ Furthermore, senior operational planners felt that the city would eventually fall without the need for heavy bombardment. Thus, the “saving in life by evacuation would perhaps not be great in light of the hazards of moving women and children to an emergency camp this time of year.”⁴⁶ The lack of available transport would further enhance the hardship of the evacuees. The evacuation might also give the Germans considerable opportunity for infiltrating agents.

Nevertheless, the meeting agreed that, “it was true that an appreciable saving of life would be effected and this humanitarian consideration must not be overlooked.”⁴⁷ Pressure from the French Red Cross also helped form the decision. So, with the operational experience gained at Caen, Boulogne and Calais, Civil Affairs officers of II Canadian Corps enacted a highly successful evacuation of Dunkirk on 5 October 1944. Foulkes' 2nd Division had already moved into Belgium by late September, supporting II Canadian Corps' clearance of the Scheldt Estuary and the approaches to Antwerp, thus the ‘masking’ of Dunkirk was carried out by several successive formations: the 4th Special Service Brigade, the 154th British Infantry Brigade and finally the 1st Czechoslovakian Armoured Brigade. II Canadian Corps Civil Affairs

officers were involved heavily throughout the evacuation scheme, even after 2nd Division had moved into Belgium.⁴⁸

The communes in the areas surrounding Dunkirk were warned on 3 October to prepare for refugees. Several refugee reception centres were already in operation in the area and these became the cornerstone of the evacuation program. As Col. Henderson wrote, "These camps are [organized] and operated by the FFI and French voluntary social workers...I visited one at the railway station at Esquelbec and found it a model of cleanliness and good organization."⁴⁹ While most refugees left the city on foot, medical cases and the elderly were transported via ambulances. Four train loads of refugees were also moved out of the city towards Esquelbec and Lille. Once in the countryside "All [supplies] were to be provided by the Sous-prefet from [civilian] resources. Communes in which refugees were to be dispersed accepted full responsibility for their maintenance."⁵⁰

Civil Affairs officers praised the French for consistently providing for civilians throughout the various evacuation schemes. In the case of Dunkirk, Colonel Henderson wrote, "I should like to give credit to the Sous-prefet [of Dunkirk] for the way in which he org[anized] his resources and directed his personnel to carry out the plan outlined by Civil Affairs."⁵¹ Another report read, "The French authorities have been most helpful in finding accommodation, providing communal feeding and arranging for medical care."⁵² In many cases, Civil Affairs officers were used primarily to coordinate the myriad French organizations helping with evacuations. In the case of Dunkirk, integration of the civilian organizations was achieved just 24 hours before the refugees began pouring out of the city. This was no small accomplishment, as the groups involved included the Red Cross, the '*Civilian Defence Passive*', various French civilian medical organisations, and disparate segments of the Resistance.⁵³

On the ground, interaction between Civil Affairs officers and the resistance fighters occurred primarily when Civil Affairs tasked the FFI⁵⁴ to act as temporary policing units to coordinate relief distribution and refugee control. Furthermore, the army used these men for guarding German prisoners, acting as local guides, auxiliary police duties and even to perform mopping up operations against small pockets of Germans by-passed by the main assault. The close interaction between Civil Affairs officials and the FFI men created a relationship whereby Civil Affairs became pseudo-liaisons between the Allies and these paramilitary groups. In one instance, Lt-Col. Cote ordered fifty-eight French naval men to return home after they came to him claiming to have the authority of an unknown French major with or-

ders to seize German weapons stored in the town. This prompted a flurry of activity highlighted by the Prefect of the Pas de Calais expressing grave concern to Commander Mengin (French LO to II Canadian Corps Civil Affairs) about whose hands these enemy weapons may be falling into. The prefect specifically requested that these weapons not fall into the hands of the FFI.⁵⁵ Although recognized officially as a branch of the Allied military, the regional character of FFI personnel was greatly affected by political, social, and economic ideologies. In this case, certain FFI groups in the Pas de Calais region were rumoured to be pro-communist and the prefect was greatly concerned by the prospect of armed communists. Lt-Col. Cote solved this minor crisis by cordoning off the town and destroying the weapons caches, save for a few hundred small arms which he distributed as he saw fit.

Problems also arose, however, with the “over-zealous activities” of resistance groups when dealing with arrests of suspected collaborators.⁵⁶ Upon liberation, many resistance groups, previously hidden, emerged well-armed and well organized and began arresting known or suspected collaborators. However, unlike in Belgium or the Netherlands, the French authorities, with aid from Civil Affairs legal experts, sought quickly to deal with the growing numbers of arrested suspects. In many cases, “a special commission, of two judges and one police officer” was established specifically to investigate charges laid down by the various resistance groups and to authorize “the release, internment or trial of the accused.”⁵⁷ Thus, the vetting of arrested suspects prevented a buildup in local or make-shift prisons, as well as establishing legal procedures for suspected collaborators.

The problems with resistance groups in France never reached the levels later seen in Belgium. The Gendarmerie were all well-armed, organized and “most willing to cooperate in any matter on which their assistance has been requested.”⁵⁸ Enforcing the law, even against armed resistance groups, did not pose a great difficulty for gendarmes, backed by Allied and Free French authority. As a report in late September stated, “In France, the state of law and order is generally satisfactory.”⁵⁹ Furthermore, the use of resistance groups for various activities like guarding prisoners, refugee control and even ‘mopping-up’ activities kept them busy and unified, contributing to war against Germany. In general, “The discipline of the majority of the FFI and the Maquis is excellent.”⁶⁰

The evacuations of the French coastal towns, based on the plan used at Boulogne and derived from the lessons of Caen, were highly successful. By keeping the population levels within the urban centres to a minimum, Civil Affairs detachments were able effectively and rapidly to deploy and assist

the few remaining civilians. Much to the chagrin of men like Col. Schroeder, the successful evacuations combined with the cooperation of various indigenous civilian agencies limited the impact of non-combatants on military resources. Furthermore, in contrast to Caen, civilian casualty figures were reduced to the hundreds. As one report stated, "Although fresh reports of concentrations of refugees are being received – mainly from the Channel coast...no special problems have arisen and the French authorities appear to have the matter well in hand."⁶¹ Thus the hard lessons derived from Caen, coupled with the success at Boulogne, provided a template for future evacuation operations and marked the beginning of a string of civil affairs successes by the First Canadian Army. Although Belgium and the Netherlands once again cast the Civil Affairs officer in the role of problem solver, the valuable experience and doctrinal lessons learned in France would prove invaluable for the tasks ahead.

Notes

- 1 Directorate of History and Heritage (DHH). Major A.K. Reid. *Canadian Participation in Civil Affairs/Military Government: Part 1: Background and Beginning*. Canadian Military Headquarters (CMHQ) Reports: Report 140. July 1945, 3.
- 2 Civil Affairs in the modern British army was established in the sands of the volatile Middle East during the Palestinian Campaign of the First World War. Men of the British Colonial Service were put into military uniform and tasked with civil administration and coordinating the relationship between the occupying British forces and local civilians. This first organization was known as the Occupied Enemy Territory Administration (OETA). The Administration was revived in 1941-42. After the liberation of Abyssinia (modern day Ethiopia), the term "Enemy" was eliminated from the OETA—a recognition of the allied status of liberated Abyssinia. After the re-capture of British Somaliland, the name was overhauled to the British Military Administration (BMA), as the term "occupied territory" bore too much similarity to the recently conquered enemy territories. Although

these early campaigns gave British administrators experience in what would become modern civil affairs, these operations lacked the one significant element that would characterise later Civil Affairs operations in Europe: the control of and cooperation with large populations in built-up urban areas.

Civil Affairs was again re-named in the summer of 1943 when the Allies invaded Sicily, now known as the Allied Military Government of Occupied Territory (AMGOT) to reflect the multi-national coalition. It was within AMGOT that American, British and, for the first time, Canadian, officers received specific training in areas of civil administration. According to First Canadian Army Civil Affairs historian Major Angus Reid, "in the initial stages of the invasions of Sicily and Italy, the new organization had considerable difficulty in performing the functions for which it had been designed. This was due largely to a general failure on the part of [field] commanders to recognize its scope and their own responsibilities for assisting the organization." Directorate of History and Heritage (DHH). Major A.K. Reid. *Canadian Participation in*

Civil Affairs/Military Government: Part 1: Background and Beginning. Canadian Military Headquarters (CMHQ) Reports: Report 140. July 1945, 3.

However, many fundamental structural and organizational developments occurred during the Italian campaign. As Prof. Edward Flint writes, "The Italian campaign illustrated the impact on Civil Affairs of the significantly larger problems...in an industrialized nation compared to the conditions experienced in Africa." Flint, Edward R. *The Development of British Civil Affairs and its Employment in the British Sector of Allied Military Operations During the Battle of Normandy, June to August 1944.* Unpublished doctoral dissertation. Cranfield University. 2009. p 137. These developments were coupled with numerous growing pains that were an inevitable product of an organization's early developmental stages. In fact, Flint points out that, "As a result and despite some areas of success, the institutional memory of politicians and military commanders was one that regarded AMGOT as an abject failure." *Ibid.*, 137. In hindsight, however, it is clear that much of the experience gained in Italy provided a foundation for Civil Affairs in North-West Europe.

- 3 Upon entering Germany, the intention was to replace the Civil Affairs designation with Military Government and replace or rearrange personnel to reflect this shift in administrative design.
- 4 DHH, Reid, report 140.
- 5 Although this would fall under the category of Military Government it was merely a change in title for many of the Civil Affairs officers.
- 6 Other reasons for preventing refugees from using main road networks was the fear of fifth column troops, the use of civilians as human shields and the difficulty air crews encountered in distinguishing columns of refugees from columns of enemy troops thus

resulting in horrific incidences of civilians being strafed.

- 7 DHH, Reid, report 140.
- 8 DHH, Reid, report 140, 16.
- 9 DHH, Reid, report 140, 4.
- 10 See C.R.S. Harris. *Allied Military Administration of Italy, 1943-1945.* London: Her Majesty's Stationary Office. 1957 for a discussion on the vetting of officials in Italy and for a discussion on the vetting of French officials see Olivier Wieviorka. *Normandy: The Landings to the Liberation of Paris.* Harvard University Press: Massachusetts. 2008.
- 11 Wieviorka, 67.
- 12 TNA, SHAEF Field Handbook of Civil Affairs, France, June 1944. WO 204/12317. Once deployed, Civil Affairs officers were between a rock and a hard place. The Allies, until 12 July 1944, did not officially recognize De Gaulle's provisional government; however, almost immediately upon liberation De Gaulle had in place many of his deputies and civil administrators. These administrative replacements occurred quite rapidly. After only the second day of the Allied entrance into Caen, Gaullist officials appointed, "a new prefect (M. Daure), a new secretary general and an acting mayor. A *commissaire de police* was also appointed." LAC, Civil Affairs in Caen – First Phase, July 1944. RG 24 Vol 16632. Thus Civil Affairs officers found themselves working closely with many Gaullists in an administrative capacity even while Allied authorities avoided official endorsement of De Gaulle's provisional government.
- 13 DHH. Major A.K. Reid *Canadian Participation in Civil Affairs/Military Government. Part 111: France, General Historical Survey, July-October 1944.* CMHQ Reports. Report 149. Jan, 1946. p 16.
- 14 Library and Archives Canada (LAC). *Civil Affairs in Caen: Appendix A to Part 111 Detailed Report 4. CA First Canadian Army. July 1944.* RG 24, National De-

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- fence, Series C-3, Volume 16632, Serial: 1159/CA/25, 2.
- 15 LAC. *Civil Affairs in Caen*. p 2.
- 16 TNA, I've switched them all to TNA. I cannot find any archive going by LNA. Sloppy.] Reconnaissance Report on Caen, 12 July 1944. WO 219/3727, 3.
- 17 TNA, Reconnaissance Report on Caen, 12 July 1944. WO 219/3727, 2.
- 18 LAC. *Civil Affairs in Caen*. 2.
- 19 TNA, Reconnaissance Report on Caen, 12 July 1944. WO 219/3727, 1.
- 20 TNA, Caen, 1.
- 21 Ibid.
- 22 LAC, First Canadian Army Fortnightly Report No 3, Aug 1944. RG 24 Vol 16632, 3.
- 23 LAC. *Civil Affairs in Caen*. 4.
- 24 Ibid., 3.
- 25 LAC. *Civil Affairs in Caen*. p 4.
- 26 LAC, First Canadian Army Fortnightly Report No 3, Aug 1944. RG 24 Vol 16632, p 6.
- 27 Ibid., 5.
- 28 Ibid., 5.
- 29 Ibid., 6.
- 30 Ibid., 3.
- 31 Ibid.
- 32 DHH, Reid, report No. 149, 18.
- 33 The plans for the evacuation of Boulogne were drawn up by Lt-Col. Walker of II Canadian Corps in discussion with Major Driver, CO of 225 CA Detachment, his 2 IC, Captain de Mun, and Lt-Col. Cote of 3 CID. LAC. *War Diary (WD), Civil Affairs II Canadian Corps. Sep 8 1944*. RG24, National Defence, Series C-3, Volume 16633, Serial: 1701/CA/4.
- 34 Ibid.
- 35 Terry Copp, *Cinderella Army: The Canadians in Northwest Europe, 1944-1945* (Toronto: University of Toronto Press, 2006), 63.
- 36 LAC. *Appendix 4: Scheme for Evacuation of Boulogne – Security Belt*. Sep 1944. RG24, National Defence, Series C-3,, Volume 16633, Serial: 1701/CA/4, 1.
- 37 LAC. *Appendix 5: Report on Scheme for Evacuation of Boulogne – Security Belt*. Sep 1944. RG24, National Defence, Series C-3,, Volume 16633, Serial: 1701/CA/4, 1.
- 38 Ibid. p 2
- 39 LAC. *Appendix 5: Report on Scheme for Evacuation of Boulogne – Security Belt*, 2.
- 40 TNA, Civil Affairs Weekly Summary No. 16, 6.
- 41 Ibid., 4.
- 42 TNA, First Canadian Army Fortnightly Report No. 3
- 43 TNA, Report on Supply System, France. 20 Sep, 1944. WO 171/722.
- 44 LAC. *War Diary. 7th Canadian Infantry Brigade*. 29 September, 1944. RG-24 C-3.
- 45 TNA, Proposed Evacuation of the Civilian Population – Dunkirk, 21 Sep, 1944. WO 219/3728.
- 46 Ibid.
- 47 TNA, Evacuation of Civs – Dunkirk, 5 Oct 1944. WO 219/3728, 3.
- 48 Ibid.
- 49 Ibid., 2.
- 50 TNA, Evacuation of Civs – Dunkirk, 3.
- 51 Ibid.
- 52 TNA, First Canadian Army Fortnightly Report No 4, 7.
- 53 Ibid., 10.
- 54 One of the most delicate tasks of Civil Affairs in these cities was dealing with the local French resistance groups. Although often labelled as the French Forces of the Interior, the FFI was in fact a semi-homogenous group comprising various resistance movements including the right wing

Ceux de la Liberation, the communist Front National, the left wing groups of Liberation-Nord and Liberation-Sud, the Christian Democrat movement 'Combat' and many more. Alongside the FFI were the Maquis, operating primarily in rural areas in southern France, who carried out a variety of guerrilla-style raids as well as providing safe haven for those fleeing work conscription in Germany. Like the FFI, the Maquis' membership came from diverse backgrounds. However, most 'Maquisards' belonged to close knit groups loyal to individual "charismatic leaders who were a law unto themselves, and inspired fierce personal loyalty." Jackson, Julian. *France: The Dark Years*. Oxford University Press: London. 2001, 484. By May of 1944 the FFI and Maquis came under the Allied chain of command, meaning orders to the French resistance now descended

from General Eisenhower at SHAEF to French General Marie-Pierre Koenig, nominal commander of the French resistance.

- 55 LAC. WD, *Civil Affairs II Canadian Corps*. Sep 15, 1944.
- 56 TNA, First Canadian Army CA Fortnightly Report No 4, 29 September 1944. FO 371/42020, 1.
- 57 TNA, Civil Affairs Weekly Summary No. 16, 3.
- 58 TNA, First Canadian Army Fortnightly Report No. 3, Sep 1944. WO 371/42018.
- 59 TNA, First Canadian Army Fortnightly Report No 4, 5.
- 60 TNA, First Canadian Army Fortnightly Report No. 3.
- 61 TNA, Civil Affairs Weekly Summary No. 16, 7.