



As special operations adapt and evolve to meet new challenges, SOF need to prepare themselves and be employed in new and unique ways. The questions posed in the Special Operations Research Topics 2023 booklet address many of these complex challenges and invite research into the intersection of human history and emergent technology. The nearly 40 research topics, each including several sub-questions, range from compound security threats in the Sahel to the Russian and Chinese ways of irregular warfare in an effort to facilitate research and writing across professional military education, academia, and the joint force.

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Special Operations Research Topics 2023

Joint Special Operations University

The Joint Special Operations University (JSOU) generates, incubates, and propagates (delivers and communicates) ideas, education, and training for expanding and advancing the body of knowledge on joint and combined special operations. JSOU is a “hybrid organization” that performs a hybrid mission—we are a “corporate university:” an academic institution serving a professional service enterprise “by, with, and through” the United States Special Operations Command (USSOCOM). As such, we are both a direct reporting unit to the Commander, USSOCOM, on all combined joint Special Operations Forces (SOF) education and leader development matters, as well as the educational and leader development component of the Command.

The JSOU Mission is to prepare SOF professionals to address strategic and operational challenges, arming them with the ability to think through problems with knowledge, insight, and foresight. **Our Vision** is to constantly strive to be(come) USSOCOM’s “Think-Do Tank” center of special operations thinking. We pursue this mission and vision through our best-practice teaching and learning, research and analysis (R&A), and engagement and service outreach operations, activities, and initiatives. We achieve these outcomes-based goals by providing specialized, joint professional military education; developing SOF-specific and unique undergraduate, graduate, and post-graduate-level equivalent curriculum; and by fostering special operations-focused R&A and outreach in support of USSOCOM objectives and United States national and global strategic goals.

JSOU’s R&A efforts are guided and informed by the U.S. national security, defense, and military strategies, as well as the **USSOCOM Mission: USSOCOM develops and employs fully capable Special Operations Forces to conduct global special operations and activities as part of the Joint Force to support persistent, networked, and distributed global combatant commands operations and campaigns against state and non-state actors to protect and advance U.S. policies and objectives.**

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Back cover. Members of 1-10 Special Forces Group (Airborne) participating in maneuvering drills in preparation for their participation in II Marine Expeditionary Force's Exercise Cold Response 2022 in Sweden. Photo by U.S. Army Captain Margaret Collins

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The research topics suggested in this publication are entirely views of the author of this publication and do not necessarily reflect the views, policy, or position of the United States Government, Department of Defense, United States Special Operations Command, or Joint Special Operations University.

A Note on the Relevance of Previous Years' Topics Lists

Previous years' research topics lists provide a repository of issues that may continue to have research relevance—especially the prior year's list. Previous editions of these publications (2009 through 2022) are available at: jsou.edu/press.

Introduction

The year 2022 has been an inflection point in both world history—with the largest interstate war in Europe since World War II—and in terms of special operations, which have played a significant role on both sides of the fight. Ukraine has received aid, training, and equipment by both state and non-state actors to defend itself against Russia’s unprovoked invasion. This war will be a testbed of research on many dimensions of warfare for decades, and special operations are no exception.

Beyond Europe, Joint Special Operations Forces (JSOF) remain engaged around the world, operating in every major theater and conducting every Special Operations Forces (SOF) core activity from security force assistance and direct action to humanitarian assistance and disaster relief (HA/DR). This includes campaigning in the grey zone to counter Chinese and Russian nefarious activities below the level of large-scale armed conflict and to protect and advance U.S. national security interests. To succeed in this new, complex, and adaptive environment, SOF need to prepare themselves and be employed in new and unique ways as special operations adapt and evolve to meet new challenges, including emergent technology and techniques in every domain. The space, cyber, and cognitive domains seem to be evolving in ways that are particularly suitable for special operations and SOF but only if emerging opportunities are identified and exploited.

The questions posed in the *Special Operations Research Topics 2023* booklet address many of these complex challenges and invite research into the intersection of human history, emergent technology, and what has been called an “exquisite capability.” The product of practitioners, scholars, and other SOF professionals employing a design-based inquiry into the research needs of the SOF enterprise, the *Special Operations Research Topics 2023* booklet is comprised of nearly 40 research topics, each including several sub-questions. These range from compound security threats in the Sahel to the Russian and Chinese ways of irregular warfare. In between are topics such as SOF culture and professional ethos and assessing the resistance potential of populations. Those involved in the process of developing these topics included not only Joint Special Operations University (JSOU) faculty, including Nate Schwagler, Jessica Libertini, Tom Searle, Will Irwin, Mark

Grzegorzewski, Dave Oakley, and myself, but faculty from across professional military education (PME), servicemembers from United States Special Operations Command headquarters, theater special operations commands and the components, and academia more broadly. The result represents some of the best ideas that the group generated as well as some pressing issues that were only touched upon during the research topics workshop but were later built up during the iterative process of fleshing out initial questions into broader topics.

The intent of the *Special Operations Research Topics 2023* booklet is to serve as a prompt or starting point for research into pressing issues facing the special operations enterprise. In a dynamic world where facts on the ground change from day to day, if not hour to hour, focusing too narrowly on these topics could serve as a constraint. This is the exact opposite of their intent. Rather, it is the desire that students and scholars use these as launching pads and perhaps even combine and intersect topics in ways not thought of or anticipated by the research topics working group. As always, interaction with those working on these research topics is welcome, from assisting in the research process to receiving copies of the final products once completed. There are even opportunities to possibly publish these products with JSOU Press, the publication arm of JSOU.

The hope is that these topics facilitate research and writing across PME, academia, and the joint force, and JSOU stands ready to assist any and all researchers as they seek ways to further understanding of JSOF and the emerging complex operational environment.

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1. SOF Support to Irregular Warfare in Strategic Competition

Topic Titles (in no particular order)

- 1A. Countering Violent Extremist Organizations and Strategic Competition in Africa: Implications for SOF
- 1B. How Should SOF Campaign in Strategic Competition?
- 1C. The Role of Allies and Partners in Strategic Competition
- 1D. Strategic Competition—Who’s Following Whose Lead?
- 1E. Countering Irregular Adversaries in Proxy Warfare
- 1F. Irregular Warfare and Grey Zone Campaigning
- 1G. Special Operations Campaigning and Integrated Deterrence
- 1H. The Role and Concept of Irregular Warfare in the Russian and Chinese Ways of War

Topic Descriptions

1A. Countering Violent Extremist Organizations and Strategic Competition in Africa: Implications for SOF

What are the strategic and operational issues at the interface of countering violent extremist organizations (VEOs) and strategic competition in Africa, particularly North, East, and West Africa (to include the greater Sahel)? Can strategic foresight analysis of macro trends in security and stability be applied to some of the major regions of Africa that are increasingly becoming epicenters of strategic competition while remaining under threat from VEOs and suffering from weak governance and state fragility? As major counter-VEO efforts in the Sahel and other areas evolve, and as the African continent is becoming a major theater of influence for great power rivalry, could Special Operations Forces (SOF) benefit from meaningful analysis and strategic forecasting and identify opportunities and challenges to compound security threats on the African continent?

1B. How Should SOF Campaign in Strategic Competition?

The U.S. is decisively engaged in an era of strategic competition against both so-called near-peer competitors (China and Russia)

and rogue states (including Iran and North Korea). This is an open-ended competition that has been continuing for some time and will continue into the indefinite future. How should SOF understand this new era of strategic competition? Are there insights from research on “infinite games” (as opposed to finite games like chess or Go) that can inform SOF’s understanding of strategic competition? Does the history of previous eras of strategic competition provide useful lessons SOF can employ in this new era of strategic competition? This new era of strategic competition pits entire societies and even multinational coalitions against one another across all domains and in diplomatic, economic, and informational realms as well as military competition. How can a relatively small force like U.S. SOF make the greatest contribution to advancing U.S. long-term interests in this era of ongoing global strategic competition? In the previous era, when SOF focused on transnational terrorist threats from VEOs, SOF developed an extensive network of joint, interagency, intergovernmental, multinational, and commercial (JIIM-C) contacts and partners. Will these same partners be vital in strategic competition? Which new partnerships and contacts will SOF need to develop for strategic competition, and which existing partnerships can SOF de-emphasize in the strategic competition era? What new skills will SOF need to develop for strategic competition, and how can SOF acquire those skills as quickly and effectively as possible?

1C. The Role of Allies and Partners in Strategic Competition

As early as the *Interim National Security Strategic Guidance—2021*,¹ the Biden administration made it clear that the U.S. “is back,” and that allies and partners would play a crucial role in U.S. strategy in strategic competition. The billions of U.S. dollars given to Ukraine in its defense against the Russian invasion of 24 February 2022, along with a significantly increased military presence in Europe, show that, when it comes to strategic competition, the U.S. is willing and able to come together to support allies and partners. What about the pacing threat of China? And, what about U.S. allies and partners in the Indo-Pacific Command (INDOPACOM) area of responsibility (AOR)? Will they, too, see increased engagement during the Biden administration? Finally, what if Taiwan becomes the next flashpoint

in strategic competition? Will (and should) the U.S. become involved to the same extent—or perhaps even greater—than it has in Ukraine?

1D. Strategic Competition—Who’s Following Whose Lead?

The U.S. may be losing its advantage compared with China in terms of science and technology, which has implications in the military domain. However, as of now, it seems that China is only gaining ground in its ability to answer the questions that the U.S. has posed, meaning that the U.S. still sets the research agenda. What indicators should leaders watch for that might suggest China has started to set the agenda themselves? While China has demonstrated itself to be a skilled adversary in the races set by the U.S., has it demonstrated itself capable of setting a course? And if so, in what contexts? What, if anything, should U.S. professional military education, and specifically Joint Special Operations University (JSOU), consider in terms of educating forces in preparation for a paradigm in which the U.S. is no longer setting the course? What are the skills needed and how can they be developed?

1E. Countering Irregular Adversaries in Proxy Warfare

How might various actions impact a shared objective relevant to countering an irregular adversary, and how can the military, intelligence community (IC), and interagency (IA) apply assessments to adapting plans and operations? Might answers to these and similar questions be employed to improve the effectiveness of theater special operations commands campaigns to counter irregular adversaries in a variety of strategically important areas? And, could improved planning and assessment processes allow the United States Special Operations Command (USSOCOM) enterprise to improve its knowledge of how to more effectively counter irregular adversaries? Finally, can ways to improve existing irregular warfare (IW) capabilities be identified?

1F. Irregular Warfare and Grey Zone Campaigning

IW is not what the label seems to imply. “Irregular” could mean that it does not occur on a regular basis, which couldn’t be further from reality. In fact, IW—including such things as terrorism, insurgency,

and popular revolutions—is a facet of everyday life globally. What makes such actions “irregular” is that they do not seem to fit the binary construct of war as a conflict between two states on a battlefield. Likewise, the grey zone—or that space between peace and war in which these actions occur—is also non-binary and includes these and other activities that fall below the threshold of armed conflict. While the U.S. and the West are proficient at developing and leading IW campaigns in the grey zone, how do they go about “campaigning” in these areas? The central idea to the 2018 Joint Concept for Integrated Campaigning is globally integrated operations throughout theaters and across AORs and their gaps and seams.² Is this easier said than done? How can operations be globally integrated across diverse operating environments while constantly reassessing these environments and assessing and adapting campaigns based on continuous analysis of results in relation to expectations, all to update campaign objectives? What type of methodology is necessary to achieve such a vision?

1G. Special Operations Campaigning and Integrated Deterrence

As further articulated in the 2022 national defense strategy, campaigning will strengthen deterrence and enable the U.S. “to gain advantages against the full range of competitors’ coercive actions.” Specifically, the U.S. “will operate forces, synchronize broader Department [of Defense] efforts, and align Department activities with other instruments of national power, to undermine acute forms of competitor coercion, complicate competitors’ military preparations, and develop our own warfighting capabilities together with Allies and partners.”³ Of particular concern here is how the joint force—in particular joint SOF (JSOF)—will successfully achieve this in the larger scope of special operations campaigning across all special operations activities. Moreover, how does integrated deterrence—enabled by combat-credible forces (including SOF) and backstopped by a safe, secure, and effective nuclear deterrent—develop and combine SOF’s strength and that of its allies and partners to maximum effect? In short, how do SOF engage in special operations campaigning and not neglect the IW dimension of strategic competition?

1H. The Role and Concept of Irregular Warfare in the Russian and Chinese Ways of War

IW is a Western military concept, encompassing the five special operations core activities of counterterrorism, counterinsurgency, unconventional warfare, foreign internal defense, and stability operations. These operations and activities are well known by adversarial states, particularly Russia and China. How do they define and conceptualize of IW, are there significant differences, and are they more expansive or restrictive than Western concepts? Finally, do those differences have an impact on the way these states apprehend of such phenomena and, perhaps more importantly, respond to them in the global arena?

2. Transregional and Compound Security Threats

Topic Titles (in no particular order)

- 2A. Compound Security Threats: Questions and Case Studies
- 2B. The Reality of Transregional Threats Intersection
- 2C. Russian Influence and Agitation in the Balkans
- 2D. Greater Northern Triangle and the Security of Central America and the Caribbean Basin
- 2E. The Arctic in Geopolitics and the Role of SOF
- 2F. The Trinity of Space, Cyber, and SOF

2A. **Compound Security Threats: Questions and Case Studies**

The concept of compound security threats was first articulated by Wilson and Smitson in their 2020 *Parameters* article, but the phenomena they describe are ancient in origin.⁴ The complexity of the modern world system, however, has witnessed and caused significant alterations to the nature and number of threats states face. The sources of conflict rest at the level of root causes and include population dynamics, resource scarcity, and border disputes. Above this level, the root causes come together—and compound—to develop into underlying currents and the form conflicts take. Finally, at the level of global order, there are the overarching dynamics of the international system (comprised of state and non-state actors). Here, all of these threats are “compounded,” leading to a lethal mix that states must address simultaneously. What are the lessons that can be gleaned from case studies of such compound security threats across time and space? What questions emerge from such an understanding of the threat environment? Finally, how can this paradigm help SOF understand the current operating environment?

2B. **The Reality of Transregional Threats Intersection**

The U.S. Department of Defense (DOD) divides the world up into geographic combatant commands (GCCs), as per the unified combatant command system (as amended). These GCCs help the DOD integrate forces across all domains for military operations within their respective AORs. The problem is, security threats do not fit nicely

inside these AORs, with actors geographically dispersed, sometimes far from their traditional geographic centers. For instance, China—primarily through the Belt and Road Initiative—is involved in arguably every AOR on the planet. In such cases, how do GCCs effectively monitor and function in their AORs? What are some other cases of such transregional security threats, and where do they intersect? How can this seeming weakness not hamstring American response and effective action? Are there alternatives to the unified combatant command system or “fixes” that allow the U.S. to keep the GCCs while adequately addressing the challenges posed by the system? Finally, do similar threat intersections plague USSOCOM? While it is a functional combatant command, theater special operations commands are also organized geographically. How can SOF overcome any obstacles to effectively maintaining awareness and freedom of action inside their AORs?

2C. Russian Influence and Agitation in the Balkans

The Balkan region is one where Russian influence abounds—from agitation for some to support for others. What is needed is to identify and analyze strategic and operational challenges faced by this narrow region of East European states, a region that is the intersection between transregional compound security dilemmas and a growing, pathological weakening of nation-states? As the surrounding region becomes more tumultuous (more so due to the invasion of Ukraine by Russian forces), the Balkans remain fragile and face multiple security challenges for the region and, in turn, NATO. The existence of a tripartite Bosnia-Herzegovina with an ethnic Serbian minority along with an independent Kosovo state means that Moscow has ample cleavages to exploit. How do the Balkans play into Moscow’s long-term strategic vision for Europe in particular and the world more generally? What can the U.S., NATO, and Special Operations Command Europe do—if anything—to mitigate Russian malign activities and quell potential unrest?

2D. Greater Northern Triangle and the Security of Central America and the Caribbean Basin

The Greater Northern Triangle of Guatemala, Honduras, and El Salvador provide a strategic challenge that demands analysis of the macro trends in security and stability in what is one of the major regions of the Western Hemisphere historically. Drivers of instability go beyond these countries, of course, requiring a broadened look at the scope of this region, arguably including the Panama-Colombia-Venezuela land corridor combined with the Greater Northern Triangle that together represents a compound security nexus with implications for strategic competition. Questions related to this situation abound, from the domestic political environments of the countries involved all the way to the role of geopolitical actors ranging from China and Russia to the U.S. and Western allies. What is needed is nothing less than a strategic foresight analysis based upon the compound security dilemma paradigm.

2E. The Arctic in Geopolitics and the Role of SOF

The Arctic is rapidly becoming contested strategic geography attracting the interests of many nations, including both Russia and China. It is also a region where U.S. INDOPACOM, U.S. Northern Command, U.S. European Command, and NATO converge. In the Arctic, rapid ecological change, extensive natural resource reserves, open-ocean transit routes, and a myriad of ancillary issues converge to create conditions for cooperation, competition, and conflict. Research could explore the full range of challenges and opportunities of SOF operating in the Arctic region across the conflict continuum. What insights from the Arctic might also apply to operations in Antarctica? What role might SOF play as part of the larger joint force in the Arctic? What are the special challenges of IA and international cooperation and competition in the Arctic? What challenges are consequent to the extreme environmental conditions of the poles on the performance of SOF personnel and equipment? What are the unique challenges and possible mitigations for SOF operating in a sparse electromagnetic signal environment? Do existing operating models remain valid in the context of Arctic conditions? What new operating models and command and control approaches might enhance

the effectiveness of SOF in the Arctic across the conflict continuum? What new capabilities or adaptations to approaches to core activities will enhance mission performance? What are the potential gaps that must be addressed for SOF to realize the objective force identified in The Army Operating Concept 2020-2040 that could be applied to Arctic missions in support of the joint force?⁵ What is the spectrum of potential allies and partners that are best aligned to support SOF in the Arctic to include indigenous populations with propensity to work with SOF?

2F. The Trinity of Space, Cyber, and SOF

The new “trinity” of multi-domain conflict is that of space, cyber, and SOF. Will future conflict center on this new intersection of SOF and the space and cyber domains? How would this function? How should U.S. Space Command, USSOCOM, and U.S. Cyber Command prepare for such a situation? What changes are necessary for the U.S. and allied security organizations to shift and prepare for such an eventuality? Are there lessons from the space and cyber domains that can inform SOF’s interaction with and operations in these domains? In what ways might SOF facilitate operations in the space and cyber domains, and in what ways might effects from these domains facilitate SOF operations?

3. SOF Leadership and Professional Ethos

Topic Titles (in no particular order)

- 3A. Making the Case for a Joint SOF Profession
- 3B. SOF Culture—What Is It, and How or Should It Change?
- 3C. Moral Drift and Moral Injury among SOF
- 3D. Ethics in the SOF Community

3A. Making the Case for a Joint SOF Profession

A central question put forward by Wilson and Pfaff in their 2022 *Joint Force Quarterly* article is whether there is now a need for a formal JSOF profession.⁶ Will claiming a jurisdiction within the context of international competition place SOF in a better position to build trust and assure autonomy? Will doing so require greater clarity on what counts as expert knowledge (as opposed to skills and tasks)? Finally, would it be a necessary institutional development to somehow certify SOF professionals in the application of this specialized knowledge?

3B. SOF Culture—What Is It, and How or Should It Change?

The SOF enterprise owns a unique culture, which carries with it benefits and hindrances. Is there a “Spartan+ mythology” in SOF, and if so, what defines it? How might this mythology need to change in the context of a new war/new needs? Does SOF need a new culture imagery? If so, what should it be, why, and how will SOF get there? What is the connection between SOF culture, ethos, and community with the ethical, legal, and moral character challenges of today? How does (or how can) culture inform a shift from “warrior” to “knight”? What is the role of the organization in terms of shaping or breaking a cultural mythology?

3C. Moral Drift and Moral Injury among SOF

SOF are faced with challenging ethical and moral situations with perhaps higher frequency than their conventional counterparts. In the context of SOF, what is moral drift? Can it be measured or assessed, and if so, how—at an individual level, at a unit level? What is the connection between moral drift and moral injury? What are the

short- and long-term impacts of moral drift and moral injury? What is the value (or impact) of giving time for SOF professionals to have “reculturation” and moral heading alignments through rotations in other organizations?

3D. Ethics in the SOF Community

In the wake of significant public news stories related to ethical failures by special operators and publication of the *United States Special Operations Command Culture and Ethics Comprehensive Review*, the role that SOF play within the greater context of the American military values is in question.⁷ While the comprehensive review emphasizes structure and procedural causes for ethical misbehavior in SOF, some scholars argue that the relationship between duty and mission success is more paradoxical given that many SOF formations emphasize use of deception that introduces an ethical grey area.

Where do similar paradoxes exist in other professions, and how might SOF learn from them? How do the traditional roles of ethical teaching (judge advocates and chaplains) resonate with SOF operators, and are there untapped options for shaping the ethical narrative and ethical decision making in SOF? What are the sources of ethical misbehavior? If ethical drift occurs after SOF selection and training, how can USSOCOM prevent it? What are the ethical challenges in SOF operations, and are they being properly identified and mitigated? How can SOF measure ethical performance? How do SOF leaders impact ethical decision making at the tactical, operational, and strategic levels?

4. Resilience and Resistance

Topic Titles (in no particular order)

- 4A. Resilience, Geostrategy, and “Strong-pointing”
- 4B. The Efficacy of Civil Resistance against Modern Authoritarianism
- 4C. Exploiting Radical Flank Effects to Improve Resistance Advantage
- 4D. Assessing Resistance Potential within a Population Group

4A. Resilience, Geostrategy, and “Strong-pointing”

A geostrategic positional advantage approach forces a competitor or adversary to focus their resources at what the famed George Kennan called the “strong points” (See Wilson, *Joint Force Quarterly*, April 2022).⁸ In this article, Wilson puts forth the argument that, in this “fourth age of SOF,” the U.S. will need SOF to play point-versus-area defense at or proximate to geographic, human security, and cognitive strong points. He further notes that the point of action may be far removed from the point of effect. In such cases, SOF can indirectly affect behavioral and decision-making calculations through actions that may be in other physical and nonphysical (e.g., virtual, cognitive, and ideational) domains. Does this logic necessitate that combined joint interagency task forces (CJIATFs) be placed at or proximate to geostrategic nexuses of conflict? Where should CJIATFs be placed if the domain under contention is nonphysical? How do SOF strong point in a nonphysical domain? Finally, how can Kennan’s and Wilson’s thinking on geostrategy and “strong-pointing” be utilized in regime and societal resilience?

4B. The Efficacy of Civil Resistance against Modern Authoritarianism

According to a 2017 Freedom House report, “the 21st century has been marked by a resurgence of authoritarian rule that has proved resilient despite economic fragility and occasional popular resistance. Modern authoritarianism has succeeded, where previous totalitarian systems failed, due to refined and nuanced strategies of repression, the exploitation of open societies, and the spread of illiberal policies in democratic countries themselves.”⁹ Resistance to tyranny is increasingly

problematic in the face of modern authoritarianism, where advanced technology that enables ubiquitous surveillance and refined methods of repression enhance the enforcement of political order and undermine individual or collective popular challenges. How do modern authoritarian governments anticipate and preemptively suppress nascent challenger development? Why has popular mobilization become more difficult? How do authoritarian regimes detect and respond to early indicators of mobilization activities? How do modern authoritarians enforce political order? What are the weaknesses of modern authoritarian regimes? How might SOF and their proxies exploit these weaknesses?

4C. Exploiting Radical Flank Effects to Improve Resistance Advantage

“Radical flank effects” refers to the impact that the actions of more radical or violent splinter groups have on a nonviolent civil resistance movement. Schock’s assessment of how radical flank effects can be either negative or positive indicates that nonviolent and violent resistance approaches might at times be complementary, open to leveraging and benefitting from the strengths and weaknesses of each through collaboration.¹⁰ This could impact resistance dynamics such as mobilization, leverage, mechanisms, and resilience. Could SOF coordinate or manage radical flank effects in a way that improves overall effectiveness, increases flexibility, mitigates vulnerabilities, optimizes use of resources, and enhances the resilience of a resistance movement?

4D. Assessing Resistance Potential within a Population Group

How can the resistance potential of a particular population group be assessed considering factors such as national character, cultural identity, geography, geopolitical circumstance, causes and extent of discontent, motivation, means, opportunity, and demonstrated history of resistance? How can SOF gauge a population’s will to resist? What are the indicators? Are there ways to increase the will to resist? To what extent can civilians assist and support resistance forces while carrying on with their normal work? What is the availability and role of ex-military personnel and leaders? How does the population

identify itself? To what degree and at what speed could a resistance organization be expanded? How large of a resistance force is possible? How difficult will it be to demobilize the resistance when political objectives have been met? Will the residual force be a threat to a new government? How does terrain influence the type of operations that can be conducted? How resilient would the resistance be in the face of harsh government repression?

5. Information, Strategic Intelligence, and the Future Operating Environment

Topic Titles (in no particular order)

- 5A. The Fourth Age of SOF and the Future Operating Environment
- 5B. SOF in the Future Operating Environment: Looking Out to 2040
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5A. **The Fourth Age of SOF and the Future Operating Environment**

Irwin's and Wilson's 2022 monograph, titled *The Fourth Age of SOF*, chronicles the history of modern SOF and insightfully describes their new challenges.¹¹ The authors break down the history of SOF's three earlier ages: 1941–1960, 1961–1979, and 1980–2020, setting the stage for projecting SOF's fourth-age roles in the emerging era of strategic competition. As SOF now and will continue to face a new and increasingly complex operating environment (OE), SOF will be challenged in ways they have never been before. How does conceptualizing of SOF as being in a fourth age facilitate thinking on the needs of the Force looking into the future, the era of the so-called fourth age of SOF? What factors are likely to change, and how should or can SOF adapt to best address these challenges?

5B. **SOF in the Future Operating Environment: Looking Out to 2040**

Various organizations have published unclassified predictions about the future OE in roughly the 2040 timeframe. Assessing what these predictions, if correct, would mean for special operations and the SOF needed to conduct future special operations, how likely does each prediction seem to be? The risks and rewards of not changing SOF to anticipate the future must be compared to the risks and rewards of making the changes, given the possibility that the predicted future

might or might not come to pass. What will indicate which path the future might take and what are the deadlines for acting based on those indicators?

An alternative approach to this problem would be to generate predictions about the OE in 2040. Some important variables, such as demographics, are relatively easy to predict. Other important variables, such as political, technological, and economic change, are much more difficult to predict. Which are the critical variables for SOF? Of those, which can be predicted within a narrow range, and which could develop in highly divergent ways? What are the interactions between these variables, and how might they affect outcomes? How might these changes impact special operations, both in terms of what missions will need to be accomplished and how those missions will be most effectively accomplished? What type of SOF will be needed in 2040? What changes will take place in the pool of personnel from which SOF are recruited? How should SOF recruitment, assessment, selection, training, education, and retention change to build the SOF that will be needed in 2040?

5C. SOF as a Covering Force

A covering force operates forward of the main force for the purpose of intercepting, engaging, delaying, disorganizing, and deceiving the enemy before the enemy can attack the force covered. An offensive covering force seizes the initiative early for the main body commander to enable a decisive attack by the main body. How can SOF perform a covering-force mission on behalf of the joint force and the Nation? Considering all domains and each battlefield operating system (BOS), are there domains where SOF can be particularly effective as a covering force? Are there domains where SOF are less effective in this role? How might support from non-SOF organizations enable SOF to succeed as a covering force? In which BOS will SOF need support from conventional forces to perform a covering-force mission? In which BOS is SOF already able to perform a covering-force mission without support? Looking ahead to the future, how will SOF need to evolve to enhance their performance as a covering force for the joint force and the Nation? What are the greatest obstacles to that evolution?

5D. United States Special Operations Command's Role in Information Advantage: Historical and Contemporary Perspectives

National power is often divided into four categories: diplomatic, information, military, and economic (DIME). Of the four DIME factors, informational power is the least understood and the most difficult for the U.S. Government (USG) to employ because, unlike the other three, there is no cabinet-level USG official responsible for informational power the way the Secretaries of State, Defense, Commerce, and Treasury are responsible for diplomatic, military, and economic power. Given these challenges, how can SOF help chiefs of mission, joint force commanders, and U.S. partners and allies gain, maintain, and exploit informational advantage? Are there historical examples of these activities that are relevant today? How can SOF and JIIM-C partners translate informational advantage into diplomatic, military, and/or economic advantage? Are there historical examples of the U.S. or others translating informational advantage into other forms of national power, and do those provide useful and usable models for future SOF operations, activities, and investments (OAIs)? Since the demand for information-related SOF OAIs consistently exceeds supply, are there ways that continental U.S.-based operational support could be better utilized to meet current and future demand? How can SOF information-related OAIs be better integrated into those of JIIM-C partners to achieve larger and more lasting effects? Are current structures for managing U.S. information-related OAIs adequate, or does the U.S. need new and different structures for this new era of strategic competition?

5E. Technology Modernization versus Human Modernization

Per the 2018 national defense strategy, U.S. national security will likely be affected by “rapid technological advancements and the changing character of war.”¹² While the U.S. remains the international pace setter in developing advanced technologies and integrating them into military operations, the strategic competitors of the U.S. are making strides to erode the competitive advantage the U.S. has long enjoyed. Driven by the explosion in internet-connected devices, the knowledge that was once the exclusive purview of a select few states is now available to almost anyone. Advantages enjoyed by the U.S.

as an early adopter of internet-enabled devices are now being eroded as other countries question U.S. primacy in this space and seek to close off their internet and/or create their own domestic technological competitors. Moreover, many of these same actors are employing technologies in new and innovative ways to impact the operational environment. Accordingly, SOF and DOD must consider new ways of using established technology while at the same time removing self-imposed mental blocks and thinking through how adversaries can use emergent technologies to the Nation's detriment. The USG must move beyond simply educating the Force on what these technologies are, start challenging itself to think of innovative ways such technologies can be deployed, and how those technologies might degrade understanding of the strategic and operational environments. In addition, the USG must consider implications for SOF when adversaries with lesser capabilities employ imaginative, asymmetric techniques. The development of these techniques will erode USG's intelligence collection capabilities and, by extension, display SOF's clandestine footprint in the world.

5F. The Future of the SOF, Intelligence Community, and Inter-agency Relationship

SOF's relationship with IA partners, particularly with the IC, has grown significantly over the past two decades and was the foundation for multiple operational successes. The importance of these partnerships will only continue to grow as SOF increasingly focus on strategic competition and integrated deterrence within the compound security environment. Although there is little doubt the SOF/IC/IA relationship will remain important, there is uncertainty in what direction the relationship should evolve to meet the Nation's needs. Any relationship among national security institutions is affected by the strategic environments they face. To better appreciate the future direction of the SOF/IC/IA relationship, it is necessary to consider how relationships evolved under previous strategic environments and then estimate how current or future conditions might and/or should affect the relationship. Some potential questions include: How has SOF's relationship with IC and IA partners evolved in the past and why? How might the compound security environment and variables

such as technology affect SOF's relationship with the IC and IA? How will the future SOF/IC/IA relationship be different from the past and/or present relationship? How will integrated deterrence affect the SOF/IC/IA relationship? What are some of the benefits, costs, and risks involved with the future SOF/IC/IA relationship?

6. SOF Integration and Human Capital

Topic Titles (in no particular order)

- 6A. The Role of Creativity and Innovation in SOF
- 6B. The Role of Mindfulness in SOF
- 6C. Recruiting a Diverse Force in a Time of National Polarization on Social Justice Issues

6A. The Role of Creativity and Innovation in SOF

There is no shortage of opinions on the role of creativity and innovation in SOF, from famous quotes of SOF leaders to published articles. SOF have special authorities that allow them to bring ideas to the field faster than the conventional forces. What has been the impact of those authorities? Are the ideas coming through truly novel? Additionally, JSOU has been providing courses in creative problem solving and design thinking. What has been the impact of these courses?

6B. The Role of Mindfulness in SOF

For years, the SOF enterprise has been exploring the value of mindfulness in contexts including post-traumatic stress recovery and pre-deployment personal resistance and resilience. However, little work has been done to explore the role and value of mindfulness in the context of creative problem solving in the SOF context. In fact, across the academic literature, there are only a handful of sources that explore the nexus on mindfulness and creativity, and these are all less than ten years old. There is a unique opportunity to add to this nascent field on mindfulness and creativity; there is also a unique opportunity to examine how the infusion, acceptance, and integration of mindfulness in the enterprise has impacted SOF culture, if at all.

6C. Recruiting a Diverse Force in a Time of National Polarization on Social Justice Issues

USSOCOM has multiple ongoing efforts to enhance diversity and inclusion (D&I) across the enterprise. As SOF address increasingly complex human security challenges, the enterprise can benefit from the rich-lived experiences of a more diverse force. At the same time,

national sentiment against police and military is growing, particularly in many of the same demographic populations that are underrepresented in SOF. In what ways might polarization and national sentiments inhibit or challenge the D&I efforts USSOCOM? What are the obstacles that USSOCOM should expect, and what strategies might it employ to navigate through or around these obstacles? What are the linkages and tensions between the constructs of diversity, inclusion, equity, and social justice that USSOCOM should understand and curate in order to advance D&I initiatives in today's political climate and social context?

7. Boundaries-Spanning Compound Security Dynamics: Climate Change, Natural Resources, and Migratory Trends and Tendencies

Topic Titles (in no particular order)

- 7A. Illegal, Unreported, and Unregulated Resource Extraction
- 7B. Climate Geoengineering and Manipulation
- 7C. Climate Migration, Migration Pathways, and Risk of Radicalization
- 7D. The Role of SOF in the Face of Increasing Climate Disasters

7A. Illegal, Unreported, and Unregulated Resource Extraction

What are the origins, impacts, and options for exploiting Chinese illegal, unreported, and unregulated (IUU) resource extraction, including fishing, mining, and timber? There is an existing knowledge gap related to the application of special operations to integrated statecraft approaches that achieve soft balancing effects against strategic competitors. Strategic competition through the IUU resource extraction issue may provide a model of JIIM-C activity with strategic communications at the center of the effort, the ability to scale efforts across the globe on this and other similar issues, and competition through “sub-sovereign operations” that mirror the geoeconomics and economic statecraft strategy adopted by the Chinese Communist Party. IUU resource extraction is inherently competition below the level of armed conflict, but does it require military support to be effective? And how does it relate to JIIM-C operations?

7B. Climate Geoengineering and Manipulation

Climate change and its effects are increasingly being felt across the world. As this continues, nation-states are likely to be tempted to engage in climate change technologies—known as geoengineering—to not only defend themselves but also to gain advantages over and impose costs upon rival states. What are the climate change technologies that are just over the horizon and how likely are they to be employed and by which types of states? Finally, would international

governance arrangements be able to curtail nation-state use before these planet-changing technologies are more fully developed and potentially proliferate?

7C. Climate Migration, Migration Pathways, and Risk of Radicalization

Climate change is driving migration flows around the world. In some cases, such as in Sub-Saharan Africa, there is some predictability to the migration flows based on lifestyle (agrarian or pastoral) and changing weather and climate conditions on the ground. However, in island nations facing the risk of losing sovereign territory due to rising sea levels, the migration pathways are not as organic. Could this lead to more dispersion, and could this increase in dispersion ultimately lead to a higher risk of radicalization due to cultural erosion and loss of identity? If this is a preventing violent extremism mission, what role might SOF play before, during, and after climate migration events, and how might those roles vary in different contexts (e.g., rapid versus slow, organic versus inorganic pathways, etc.)?

7D. The Role of SOF in the Face of Increasing Climate Disasters

Natural disasters, including flooding, storms, and fires, have been increasing in both intensity and frequency around the globe. This could signal a higher demand for HA/DR operations by SOF personnel. Given additional demands in the evolving geopolitical climate, what can SOF do to balance and respond to increasing demands, and what are the risks of failing to support strategically important partner nations in an HA/DR response in the event that there are not sufficient resources available?

8. Mathematics, Technology, and Joint Combined SOF Education-Peculiar Advancements

Topic Titles (in no particular order)

- 8A. Educating Joint Combined SOF in an Era of Compound Security Competition
- 8B. Artificial Intelligence and Data-Driven Special Operations
- 8C. A Mixed-Methods Approach in Special Operations Research

8A. Educating Joint Combined SOF in an Era of Compound Security Competition

The world is changing quickly and becoming increasingly complex. How do professional military education (PME) institutions—in particular JSOU—educate joint combined Special Operations Forces (JCSOF) to successfully engage in such an environment? How do PME institutions prepare JCSOF with the knowledge, understanding, and freedom of thought necessary to operate successfully in an environment characterized by compound security competition? What types of research would support the learning pathways in action (resilience and resistance, strategic influence through informational advantage, strategic intelligence and emergent technology, design-based integrated campaigning and statecraft, and leadership and the JSOF professional ethos)? Finally, how might such research be integrated back into the classroom to educate and inform JCSOF?

8B. Artificial Intelligence and Data-Driven Special Operations

Advancements in mathematical and computational capabilities are rapidly expanding. From artificial intelligence (AI) to geographic information systems analyses, data can be harnessed in all sorts of ways, from identifying social media interference in a partner nation's election to improving the humanitarian response to an earthquake. At the same time, there are risks to using these tools. How can SOF employ AI and other computational advances wisely? What might it mean to be responsibly data driven—what questions, what data, whose data, and at what cost? What, if any, are the ethical considerations of becoming more data driven?

8C. A Mixed-Methods Approach in Special Operations Research

There have been incredible advances in stochastic mathematical approaches as well as advances in human-led, table-top exercises and other predictive planning methodologies. How might these advances be leveraged in a combined way using mixed methods, such as running a computational simulation to determine a few most likely scenarios that can then be explored in depth in a human participatory modeling exercise, using a human participatory modeling exercise to create the probability distribution (range and likelihoods) that could then be fed into a computational-based modeling/simulation, or other creative ideas, including iterative loops between humans and computers?

Acronyms

AI	artificial intelligence
AOR	area of responsibility
BOS	battlefield operating system
CJIATF	combined joint interagency task force
D&I	diversity and inclusion
DIME	diplomatic, information, military, and economic
DOD	Department of Defense
GCC	geographic combatant command
HA/DR	humanitarian assistance/disaster relief
IA	interagency
IC	intelligence community
INDOPACOM	Indo-Pacific Command
IUU	illegal, unreported, and unregulated
IW	irregular warfare
JCSOF	Joint Combined Special Operations Forces
JIIM-C	joint, interagency, intergovernmental, multinational, and commercial
JSOF	Joint Special Operations Forces
JSOU	Joint Special Operations University
OAI	operations, activities, and investments
OE	operating environment
PME	professional military education
SOF	Special Operations Forces

USG	United States Government
USSOCOM	United States Special Operations Command
VEO	violent extremist organization

Endnotes

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