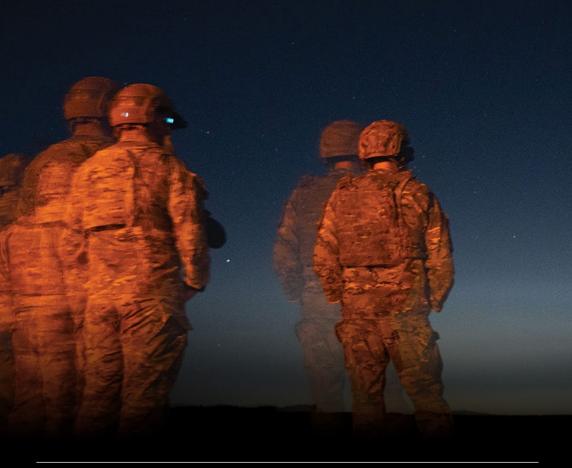## ADVANCING THE SOF WARRIOR MIND:

ESSAYS FROM THE JSOU ACADEMIC YEAR 2025 CALL FOR SPECIAL OPERATIONS PAPERS

JSOU Report 25-20

On the cover: U.S. Soldiers assigned to the 2nd Battalion, 5th Special Forces Group (Airborne), observe a mounted live-fire exercise with air support from an AC-130 gunship assigned to the 1st Special Operations Wing, at Saint Vith Range during exercise Sage Eagle 25-1 at Fort Knox, Kentucky, Oct. 22, 2024. Source: Technical Sergeant Sarah McClanahan

September 2025

JSOU PRESS
JOINT SPECIAL OPERATIONS UNIVERSITY

ADVANCING THE SOF WARRIOR MIND:
Essays from the JSOU Academic Year 2025 Call for Special Operations Papers

JOINT SPECIAL OPERATIONS UNIVERSITY
MacDill Air Force Base, Florida | September 2025

JSOU Report 25-20

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Foreword

The journey to the Academic Year (AY) 2025 Call for Special Operations Papers began in the summer of 2024, when a Joint Special Operations University (JSOU) working group met to review topics in the *2024 Special Operations Research Topics* (SORT) booklet, refine research questions, and develop a program to solicit innovative written ideas from—and for—the SOF enterprise.

Topics focused on USSOCOM's PEOPLE, WIN, TRANSFORM lines of effort, and were intended to encourage scholarly work to address USSOCOM's most pressing challenges.

JSOU had no idea what to expect when it launched its inaugural Call for Special Operations Papers in September 2024. We set our bar of success at 15 submissions, but as it turned out, we received triple that amount, proving the SOF enterprise remains engaged in public dialogue and has something to say.

Submissions came from operators, enablers, educators, students, and scholars—representing a true cross-section of the SOF enterprise. Their papers provided innovative insights and solutions, some of which are already being put into action.

As we send this AY2025 edited volume to print, the AY2026 Call for Papers is underway. This year's focus is "technology in Special Operations," and we've added a new submission category—fiction. Get all the details at https://www.jsou.edu/Press/CallforPapers. We value your expertise, insights, and experience and hope you'll consider submitting.

In the meantime, enjoy this edited volume of last year's winning and high-scoring submissions.

Garric Banfield   **Paul Brister, PhD**
JSOU CSEL   **JSOU President**

Acknowledgments

Reviewing, evaluating, editing, and publishing the 15 essays included in this volume was no small feat. The project had many moving parts that required countless hours of coordination, review and evaluation, and editorial and design work.

I'd first like to thank the AY2025 JSOU Call for Special Operations Papers Grading Committee Review members for their part in this inaugural effort. They brought experience and expertise to the evaluation process, providing thoughtful feedback and recommendations. More importantly, their input helped make the program a resounding success. A huge thank you to Robert Burrell, PhD; Terry Doan; Russell Hampsey; Doug Jordan; John Labuz; Christopher Marsh, PhD; Shannon Meade, DPA; David Oakley, PhD; Joe Pastorek; Eon Pereira, DEL; and Kari Thyne, DLS.

Next, none of this would have been possible without the small but mighty JSOU Press team. Editors Beth DeGeorge and Alina Alvarez Perez worked tirelessly to edit submissions under a tight deadline. Previous press designer Laura Tindall shaped the look and feel of our educational materials, with current designer Arianna Czesler picking up where she left off and offering keen insights and a fresh new perspective. All joined the press in early 2025, midway through the AY2025 Call for Special Operations Papers effort, and didn't hesitate to jump in the deep end with both feet. I'm grateful for such a dedicated and talented team.

Finally, I'd like to thank the leadership at both JSOU and USSOCOM for their support in making this effort a success. Dr. Paul Brister, JSOU President; Command Sergeant Major Garric Banfield, JSOU CSEL; Dr. Jaime Macias, JSOU Chief of Staff and Operations; Dr. Amie Lonas; former JSOU Provost; and Harold Miller, JSOU Engagements and Communications Chief, all worked tirelessly to ensure the program's success.

General Bryan P. Fenton, USSOCOM Commander, and Command Sergeant Major Shane Shorter, USSOCOM CSEL, took personal interest in the program and the submissions, and they recognized the winners not once but twice. Without the support of these leadership teams, I am confident the program would not have exceeded our expectations the way it did.

As we go to press on this edited volume, JSOU and the JSOU Press team are ramping up the AY2026 Call for Special Operations Papers effort. This year, we've opted to go with a defined theme (technology in SOF), refined the categories a bit, and added a fourth category—fiction. See page 285 or visit https://www.jsou.edu/press/callforpapers for details.

We look forward to another stellar year of SOF-related research.

Melanie Casey
Editor in Chief, JSOU Press

PART I
AY2025 JSOU
CALL FOR SPECIAL OPERATIONS PAPERS WINNING SUBMISSIONS

Academic Year 2025 was the inaugural year for JSOU's Call for Special Operations Papers program. Submissions were grouped according to the following categories and evaluated against others in that category.

CATEGORY 1: Joint Special Operations Senior Enlisted Academy students

CATEGORY 2: Professional military education students and military practitioners

CATEGORY 3: Academic faculty and civilian scholars

The authors of the winning submissions included in this section were personally recognized by the JSOU president and USSOCOM commanding general.

Developing a SOF Multidimensional Ethics Scale

By Sergeant First Class Michael Seitz

The Special Operations Forces Multidimensional Ethics Scale, or SOF MES, integrates the ethical dimensions of moral equity, relativism, and contractualism and uses the five SOF Truths to provide a comprehensive framework for decision-making. The SOF MES provides a foundational understanding of the ethical dimensions and their application in SOF-peculiar scenarios. Source: Adobe Stock

Ethics in Special Operations Forces (SOF) is an ongoing topic of interest within the special operations enterprise, from the *2020 United States Special Operations Command (USSOCOM) Comprehensive Review* to the 2022 *Special Warfare* magazine issue entitled "Ethics and Special Operations." The *Comprehensive Review* states, "The Review Team did not assess that USSOCOM has a systemic ethics problem. The Review Team did assess that in some instances USSOCOM's cultural focus on SOF employment and mission accomplishment is to the detriment of leadership, discipline, and accountability."
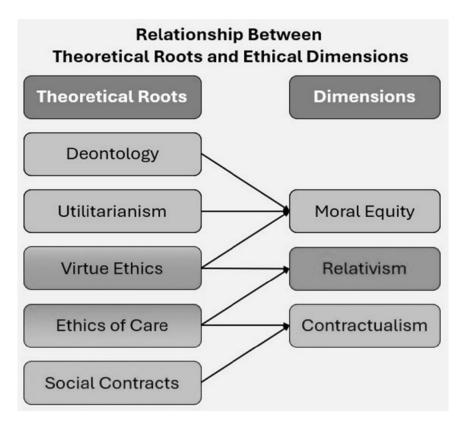
Although the *Comprehensive Review* addressed the special operations community thoroughly, there were some outstanding limitations. The review was completely qualitative in structure, relying on group interviews to assess ethics within the enterprise. In addition, the interviews were limited in scope due to avoiding undue command influence and Uniform Code of Military Justice (UCMJ) violations—"In the event, a respondent makes an admission that

causes the questioner to suspect their involvement in, or knowledge of, a crime, questioning on that topic should cease immediately." Two years later, *Special Warfare* magazine published an "Ethics and Special Operations" edition that provided insights on applied ethical theories and recommended training. The main gap between these publications is the recommendation of a quantitative assessment for measuring ethics in SOF, demonstrating an opportunity for the development of a SOF Multidimensional Ethics Scale (SOF MES) aligned with previous academic research in ethics and ongoing SOF ethics initiatives. A SOF MES benefits the special operations enterprise because it provides quantitative insights into how SOF perceive ethical decisions through a dimensional lens.

Dimensions of Ethics

Many models, philosophies, and dimensions are applied to the academic study of ethics. *A Special Operations Forces Ethics Field Guide* lists five theoretical roots of ethics: deontology, utilitarianism, virtue ethics, ethics of care, and social contracts. Deontology refers to acting within universal laws and justice. Utilitarianism refers to providing the greatest good to the greatest number of people. Virtue ethics refers to how individuals reflect on their actions and how they are perceived by the public. Ethics of care refers to benefiting those the individual has a special trust or obligation to. Social contracts refer to fulfilling an obligation to society. Each of these theoretical roots aligns with one or more ethical dimension (See Fig. 1).

In 1990, Reidenbach and Robin identified three ethical dimensions in the initial development of the MES: moral equity, relativism, and contractualism. The moral equity dimension reflects right and wrong from an individual perception of justice. Moral equity is related to deontology, utilitarianism, and virtue ethics theoretical roots. The relativism dimension reflects right and wrong

Relationship Between Theoretical Roots and Ethical Dimensions

Theoretical Roots	Dimensions
Deontology	
Utilitarianism	Moral Equity
Virtue Ethics	Relativism
Ethics of Care	Contractualism
Social Contracts	

Figure 1. A diagram showing the relationship between theoretical roots and ethical dimensions. Source: Author

within the perception of cultural and traditional values rather than the individual. Relativism is related to virtue ethics and ethics of care theoretical roots. The contractualism dimension reflects right and wrong from an individual perception of an implied contract between the organization and society. Contractualism is related to ethics of care and social contracts theoretical roots.

The SOF MES focuses on these three dimensions of ethics because of their application to the special operations enterprise and to maintain brevity in the scale creation. These three dimensions of ethics serve as distinct perspectives to viewing the actions taken in a given scenario. It is important to note that no dimension of ethics represents a more-or-less ethical approach. This provides a flexible

framework to the SOF MES, as many SOF ethical dilemmas are not black and white due to their complexity.

Applying the Dimensions of Ethics to the SOF Truths

The SOF MES uses the five SOF Truths to develop scenarios because they have served as a basic guide for SOF since 1987. The five SOF Truths are:

- *Humans are more important than hardware.*

- *Quality is better than quantity.*

- *Special Operations Forces cannot be mass-produced.*

- *Competent Special Operations Forces cannot be created after emergencies occur.*

- *Most special operations require non-SOF support.*

As mentioned, each scenario is aligned to a SOF Truth within the construct of the SOF MES. In turn, each scenario has three corresponding actions aligned to the dimensions of ethics: moral equity, relativism, and contractualism. The intersection of SOF Truths and the ethical dimensions provides three key elements to the SOF MES: It is SOF peculiar; it is tied to defined and scoped dimensions of ethics; and it measures ethical perspectives within the dimensions, not black-and-white ethical answers.

Creating the SOF MES

Each scenario contained in the SOF MES is followed by the three actions taken, aligning with each of the dimensions of ethics. Each action is individually presented and followed by the same 6-scaled questions. The 6-scaled questions address: moral equity (unfair/unjust, morally wrong), relativism (traditionally acceptable

and culturally acceptable), and contractualism (violates the trust of the American people and violates a SOF Truth). Reidenbach and Robin's MES consisted of 8-scaled questions: four measuring moral equity, two measuring relativism, and two measuring contractualism. Moral equity in the SOF MES is condensed from four questions to two for brevity and overlapping concepts. Contractualism questions are adapted to reflect the implied contract between SOF and the American people. For instance, "violates an unspoken promise" is changed to "violates the trust of the American people," and "violates an unwritten contract" is changed to "violates a SOF Truth" (see Table 1).

Table 1. A 6-scaled SOF Multidimensional Ethics Scale
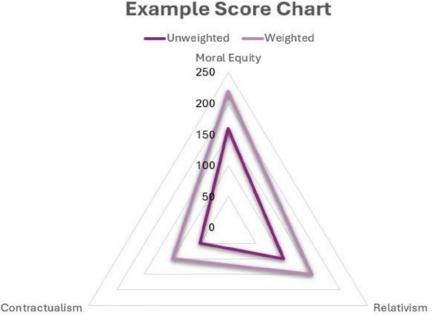
	1	2	3	4	5	6	
Unfair/Unjust							Fair/Just
Morally Wrong							Morally Right
Traditionally Unacceptable							Traditionally Acceptable
Culturally Unacceptable							Culturally Acceptable
Violates the trust of the American people							Does not violate the trust of the American people
Violates a SOF Truth							Does not violate a SOF Truth

Source: Author

These changes focus the contractualism dimension questions into the scope of SOF ethics and the specific trust of the American people for SOF. After all scenarios and individual action questionnaires are complete, the scenarios are shown again with all three actions to be ranked. While the 6-scaled questions measure an operator's preference among the ethical dimensions, a final ranking of the three actions strengthens the validation of preferred ethical dimension.

Scoring the SOF MES

The SOF MES outputs a score for the 6-scaled questions in a radial graph and ethical dimension rankings based on action preference in a table or bar graph (See Fig. 2, Fig. 3, and Fig. 4). Total scores in each dimension are calculated by the numerical total of the two associated 6-scaled questions, e.g., moral equity (unfair/unjust and morally wrong). Scores for each dimension are weighted by a times two factor when they correspond to the action associated

Example Score Chart

—Unweighted   —Weighted

Moral Equity

250

200

150

100

50

0

Contractualism

Relativism

Figure 2. A figure depicting an example score chart. Source: Author

Example Action Ranking Results						
	SOF Truths (Scenarios)					
	1	2	3	4	5	Totals
Moral Equity	1st (3)	1st (3)	1st (3)	2nd (2)	1st (3)	14
Relativism	3rd (1)	2nd (2)	2nd (2)	1st (3)	3rd (1)	9
Contractualism	2nd (2)	3rd (1)	3rd (1)	3rd (1)	2nd (2)	7
	Ranking (Score/Points)					

Figure 3. A figure depicting an example action ranking results. Source: Author
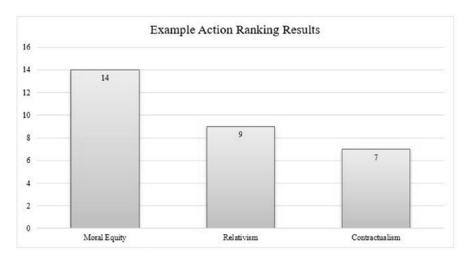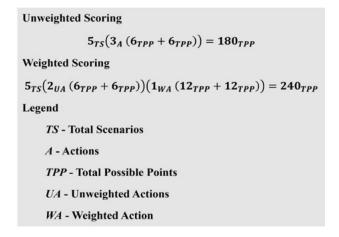
Figure 4. A figure depicting action ranking results. Source: Author

with the dimension, e.g., action 2, relativism (traditionally acceptable and culturally acceptable) times two.

This results in a total possible unweighted score of 180 per dimension and a possible weighted score of 240 per dimension (See Fig. 5). The determination for using an unweighted versus weighted score relies on the validity of the actions against the proposed dimension. This validity is further tested through the ranking of

Unweighted Scoring

$$5_{TS}(3_A (6_{TPP} + 6_{TPP})) = 180_{TPP}$$

Weighted Scoring

$$5_{TS}(2_{UA} (6_{TPP} + 6_{TPP}))(1_{WA} (12_{TPP} + 12_{TPP})) = 240_{TPP}$$

Legend

TS - Total Scenarios

A - Actions

TPP - Total Possible Points

UA - Unweighted Actions

WA - Weighted Action

Figure 5. A figure depicting example action ranking results. Source: Author

actions after the 6-scaled questions. The scores reflect a relative degree of which dimension of ethics the operator agrees with or prefers when presented with a SOF ethical scenario.

Applying the SOF MES

The proposed SOF MES does not assess how ethical or unethical an operator's decision-making is. No single metric or scale can numerically quantify an ethical decision in a complex scenario. The SOF MES provides a foundational understanding of the ethical dimensions and their application in SOF-peculiar scenarios. At the USSOCOM level, the SOF MES should be used to measure differences in ethical dimension perspectives across demographics like components, number of deployments, aligned area of responsibility, and rank. Similarly, this approach can be used across lower levels of command in SOF.

The SOF MES provides a foundational understanding of the ethical dimensions and their application in SOF-peculiar scenarios.

Any mass administration of the SOF MES should strive for maximum anonymity and require only demographic information essential to the research question. At the individual operator level, the SOF MES should be widely available to access—for example, a link on the USSOCOM homepage.

Demographic information should not be required for an open-link SOF MES. An individual operator should be able to utilize the SOF MES to personally measure and gain insights into understanding their own perspectives of the ethical dimensions. More information

on the ethical dimensions, avoiding ethical drift, and future training should be available at the end of the open-link SOF MES.

Considerations for Future Training

A *Special Operations Forces Ethics Field Guide* provides 12 Ethical Battle Drills and the Fundamentals of Handling Character Challenges with Honor. These resources present ethical scenarios for SOF to practice and discuss difficult ethical decision-making. Additionally, the field guide provides academic material and resources for the study of ethics. Although the field guide does not present the ethical dimensions proposed for the SOF MES, it does cover ethical theoretical roots that are directly tied to the dimensions. Development of future training could include more concise and direct resources culled and adapted from the field guide. The current guide is 51 pages long and not widely accessible to the force. Furthermore, Joint Special Operations University can adapt material from existing course content related to ethics, moral resiliency, and moral drift or develop new material specific to ethics models, philosophies, and dimensions.

Next Steps

The first step in creating a SOF MES is to establish an experienced and representative team to develop scenarios and actions. The scenarios should apply to all SOF and be tied to one of the SOF Truths (see Appendix, Example Scenario 1). The second step is to validate the actions against the ethical dimension they represent through focus group tests. The third step is to gain final approval and develop a roll-out plan, dependent on the application of the SOF MES (organizational measurement and/or individual tool). It is recommended that the SOF MES be administered at least once as an organizational measurement for consideration in developing future tools and training to support the SOE and study of SOF ethics.

Appendix

Example: Scenario 1 *(SOF Truth 1)*

A SOF Leader must determine which tactical team receives the new equipment. Team 1 is more experienced and tasked with a more sensitive mission—pairing Team 1 and the new equipment increases mission success. Team 2 is less experienced and tasked with a standard mission—pairing Team 2 with the new equipment increases survivability.

(Moral Equity)

Action 1: The SOF Leader splits the new equipment between Team 1 and Team 2.

	1	2	3	4	5	6	
Unfair/Unjust							Fair/Just
Morally Wrong							Morally Right
Traditionally Unacceptable							Traditionally Acceptable
Culturally Unacceptable							Culturally Acceptable
Violates the trust of the American people							Does not violate the trust of the American people
Violates a SOF Truth							Does not violate a SOF Truth

[New Screen – remove Action 1, leave Scenario 1]

(Relativism)

Action 2: The SOF Leader pairs Team 2 with the new equipment to offset their inexperience.

	1	2	3	4	5	6	
Unfair/Unjust							Fair/Just
Morally Wrong							Morally Right
Traditionally Unacceptable							Traditionally Acceptable
Culturally Unacceptable							Culturally Acceptable
Violates the trust of the American people							Does not violate the trust of the American people
Violates a SOF Truth							Does not violate a SOF Truth

[New Screen – remove Action 2, leave Scenario 1]

(Contractualism)

Action 3: The SOF Leader pairs Team 1 with the new equipment to ensure mission success.

	1	2	3	4	5	6	
Unfair/Unjust							Fair/Just
Morally Wrong							Morally Right
Traditionally Unacceptable							Traditionally Acceptable
Culturally Unacceptable							Culturally Acceptable
Violates the trust of the American people							Does not violate the trust of the American people
Violates a SOF Truth							Does not violate a SOF Truth

Source: Author

About the Author

Sergeant First Class Michael Seitz is assigned to Special Operations Command Central, serving as the Psychological Operations Non-Commissioned Officer in Charge. He holds a bachelor's degree in psychology and sociology and a master's degree in applied psychology. Seitz has completed 12 courses with JSOU, including two Non-Commissioned Officer Professional Development classes; Joint Fundamentals (CEP 1) and Enterprise Management (CEP 2) as the Distinguished Honor Graduate. He has two combat deployments to the Central Region.

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Reframing Homeland Defense: The Case for Restructuring an Outdated Security Construct

By Major Harrison M. Zabell

Background

On January 20, 2025, President Donald J. Trump signed Executive Order (EO) No. 14,167, *Clarifying the Military's Role in Protecting the Territorial Integrity of the United States.*[1] Section 3 (a), Implementation, directs the secretary of defense (SecDef) to develop a planning requirement for U.S. Northern Command (NORTHCOM) to "seal the borders and maintain the sovereignty, territorial integrity, and security of the United States by repelling forms of invasion, including unlawful mass migration, narcotics trafficking, human smuggling and trafficking, and other criminal activities" by February 19, 2025.[2] On the same day, President Trump published *Declaring a National Emergency at the Southern Border of the United States.*[3] Section 6, Reporting Requirement, directs the SecDef and the Secretary of the Department of Homeland Security (DHS) to submit a joint report by April 20, 2025, detailing conditions at the southern border and providing recommendations concerning operational control.[4] Notably, this report must recommend whether to invoke the Insurrection Act.

Initially approved by Congress and signed into law by President Thomas Jefferson on March 3, 1807, the Insurrection Act allows the President to circumvent the Posse Comitatus Act (an 1878 federal law prohibiting troops from participating in civilian law enforcement) under specific circumstances.[5] It has been invoked multiple times throughout American history, including during civil rights-era protests to enforce federal law.

The new administration has significantly shifted national security priorities and policy, emphasizing the Western Hemisphere (WHEM) and homeland defense and countering intermestic (border-region) illicit networks (C-I2N). This strategic pivot prioritizes vulnerabilities exploited by non-state actors, such as transnational criminal organizations (TCO), and national security threats emerging from irregular warfare (IW) and gray zone activities. This shift has

> *The new administration has significantly shifted national security priorities and policy, emphasizing the Western Hemisphere and homeland defense and countering intermestic (border-region) illicit networks.*

significant implications for the special operations community, the Unified Command Plan (UCP), and the U.S. military within the national security enterprise.

U.S. Northern Command

Post-9/11, NORTHCOM was formed from the remnants of Joint Forces Command, previously U.S. Atlantic Command, as an immediate response for attacks exceeding law enforcement (LE) capabilities, providing temporary coverage for counterterrorism (CT) efforts and allowing for the creation of DHS.[6] However, since NORTHCOM's inception, the threat environment has shifted drastically, forcing it to cover a diffuse set of loosely related tasks and pointing to a fundamental flaw in the WHEM structure of the UCP.[7] Today, NORTHCOM's responsibilities stretch across the North American Aerospace Defense Command (NORAD), Defense Support of Civil Authorities (DSCA), and Arctic security, and it oversees the range of military operations for Canada, Mexico, and the Caribbean.[8]

NORTHCOM's primary mission is to defend against external threats with "barrels out," meaning forces are postured outward for defense. Designing NORTHCOM's boundaries to comprise all of North America was meant to ensure in-depth defense.[9] In 2002, placing the continental seams under NORTHCOM created the veneer of a defense-in-depth strategy. However, it never resolved the inconsistency of a military commander operating on U.S. soil under Title 10. Additionally, U.S.-Mexico security cooperation

requires a shoulder-to-shoulder framework, a task incompatible with a combatant command (COCOM) focused on external defense. U.S. perimeter security and foreign capacity building are inherently contradictory missions, and no other commander is simultaneously responsible for homeland defense and building partner capacity.

Exacerbating NORTHCOM's fundamental misalignment, the Posse Comitatus Act prohibits using active-duty forces under Title 10 in domestic LE.[10] While the National Guard (NG), under Title 32, is exempt from Posse Comitatus, the NG Bureau (NGB), the Department of Defense (DoD), and the U.S. President all possess the authority to activate NG troops on U.S. soil, making NORTHCOM an unnecessary bureaucratic layer that inhibits the functional realities of border protection.[11]

> *U.S. perimeter security and foreign capacity building are inherently contradictory missions, and no other commander is simultaneously responsible for homeland defense and building partner capacity.*

More suited to Canadian partnership on missile defense and NORAD requirements, NORTHCOM has neglected security force assistance (SFA) with Mexico, further exposing doctrinal contradictions.[12] U.S. Ambassador to Mexico Ken Salazar recently stated that Mexico "closed the doors" on U.S. SFA.[13]

Those wedded to NORTHCOM ownership of Mexico argue that this fact is despite the command's efforts. However, no one can deny that, in practice, the U.S.-Mexico military-to-military relationship falls well short of being cooperative. The last press release by NORTHCOM regarding cooperation inside Mexico was in 2017, highlighting a soccer game and command post-exercise training

response to an illicit aircraft flight.[14] Nevertheless, U.S. policymakers understand that Mexico prefers a security alignment under a North American coalition rather than a Latin American framework. However, the national security enterprise has no obligation to build a security architecture based on the preferences of foreign governments.

The NORTHCOM commander would not command all forces on U.S. soil in a direct attack. NORTHCOM's missions of planning, organizing, and executing defense and support missions are

> *Upon examination, it is evident that the current U.S. security command plan is misaligned with modern threats, requiring a fundamental restructuring to enhance efficiency and coordination.*
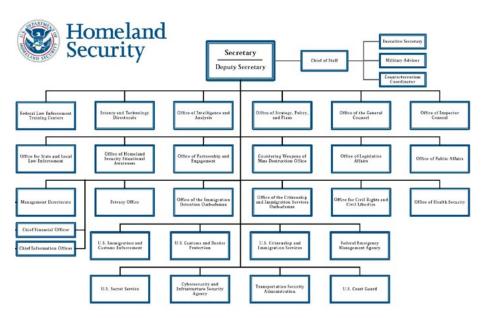
specific functions limited by geographical boundaries. While some may point to the claim's irrelevance, this fundamental discrepancy and its pretense of a geographical command have led others to characterize NORTHCOM's mission set as "somewhat fuzzy."[15] Upon examination, it is evident that the current U.S. security command plan is misaligned with modern threats, requiring a fundamental restructuring to enhance efficiency and coordination. Current national security priorities antiquate NORTHCOM in its current form, and the drastic shift in the national security enterprise amplifies a potentially catastrophic misalignment.

The joint force's organizational strategy must be flat, agile, and cost-effective. Instead, NORTHCOM dilutes focus, diverting the NORAD commander's attention from one of the nation's most critical missions. Moreover, the President's EO, *The Iron Dome for America,* has massive implications for U.S. Strategic Command and

NORTHCOM.[16] Requirements to implement a next-generation missile defense shield no doubt further distract the NORAD commander from NORTHCOM's core missions.

U.S. Department of Homeland Security

The bureaucratic complexities of the U.S. security architecture extend well beyond NORTHCOM and into DHS itself. Nearly 23 years after its creation, the DHS still lacks a streamlined operational structure. DHS encompasses a wide array of disparate organizations.[17] See Figure 1.

Figure 1. U.S. Department of Homeland Security organizational chart. Source: DHS.gov

The excessive structural depth and complexity hinder agility and adaptability. In *The National Security Enterprise: Navigating the Labyrinth*, Rishikof and George explain that "[DHS] makes it clear that placing [22] different agencies under a single secretary

for homeland security did not ensure a common purpose or clear missions; rather, it multiplied the challenges."[18] In its current form, DHS is vastly more structurally than interactively complex, limiting its ability to counter evolving threats effectively.[19]

DHS's sheer size and disjointed structure prevent it from effectively leveraging DoD support within the broader national security enterprise, such as counterthreat finance, detection, and monitoring.[20] Furthermore, DHS must overcome layers of complexity to collaborate with NG Special Operations Forces (SOF), such as the 19th and 20th Special Forces Groups (Airborne). This lack of integration undermines an excellent opportunity for Title 32 SOF to add value to C-I2N. The 2020 IW Annex to the National Defense Strategy (NDS) sets the goal of integrated IW as a core competency.[21] The new designation of narco-traffickers as foreign terrorist organizations (FTO) is an opportunity to enhance IW capability through unified action.[22]

If the U.S. is to operate effectively within Mexico, a unilateral approach is not viable.

This new prioritization of illicit networks has broad implications for the DoD as countering violent extremist organizations (C-VEO) is a critical mission of the U.S. military. Until now, the DoD has had a limited role in supporting hard-security DSCA, peripherally working narcotics missions, and counter-TCOs. However, Posse Comitatus does not prohibit Title 10 support roles for domestic operations. Nevertheless, the U.S. military's limited engagement has allowed TCOs to generate billions of dollars due to drug revenue, leading to resource overmatch compared to Latin American LE and militaries.[23]

If the U.S. is to operate effectively within Mexico, a unilateral approach is not viable. Given Latin America's geopolitical and socio-linguistic realities, organizations equipped to operate in the human domain with cultural expertise should manage security cooperation

with Mexico. Plan Colombia offers a strong example of how bilateral security cooperation can achieve success. U.S. SOF engagement in Colombia "has been hailed widely as an exemplar of effective capacity building."[24] Intermestic border security and military operations in foreign nations are distinct missions requiring separate command structures. C-I2N and border security missions inevitably require some degree of interlocking sectors of coverage. However, while some operational overlap exists, delineating these operations prevents undue complexity and allows the U.S. military to engage on foreign soil to address push factors.

NORTHCOM's responsibility for Arctic security demonstrates a similarly unprepared posture for an emergent theater. While the threat of I2N is a priority requiring immediate attention, the future Arctic threat landscape is only increasingly relevant. Indeed, "readiness is a multifaceted challenge that involves trade-offs between near-term and long-term priorities."[25] Environmental change in the Arctic will significantly reshape the security environment.[26] The national security enterprise must address polar security to prepare the force for the extreme hazards of operating in Arctic conditions. The U.S. assesses that anthropomorphic geophysical changes in the Arctic will increase interest in transit routes and military activity.[27] Melting ice opens new shipping routes and access to natural resources like oil, gas, and minerals, ultimately exacerbating geopolitical competition.[28] Economic competition in shipping and mineral extraction intensifies as the Arctic becomes more accessible. This increased interest heightens geopolitical tensions and raises the potential for disputes, leading to greater regional militarization.

Russia and China in the Arctic

This expanding military activity increases tensions among Arctic states, exacerbating defense and security concerns as coastal

areas become more vulnerable to strategic approaches. Moreover, Russian and Chinese aggression in the Arctic presents several threats. The Russian Northern fleet is an integral part of the overall Russian strategy in the Arctic, which fuses an assertive military posture based on a critical economic approach.[29] Given the Arctic's importance to Russia and the direct geographic juxtaposition of Canada and the U.S., the heightened friction between East and West will manifest in a military-presence race.

> *Economic competition in shipping and mineral extraction intensifies as the Arctic becomes more accessible. This increased interest heightens geopolitical tensions and raises the potential for disputes, leading to greater regional militarization.*

Twenty percent of Russian exports travel through the Arctic; the region is responsible for approximately 10 percent of its gross domestic product.[30] Economic factors have led Russia to invest heavily in infrastructure and presence in the region. Russian forward bases provide early warning, search and rescue, surveillance, logistics, resupply and interdiction, and air defense. These bases house short-, medium-, and long-range S300, S400, P800, K300, among other missile systems.[31] Improved Russian infrastructure also provides the capability for MIG-31s to project tactical aviation capability.[32] These Russian infrastructure improvements in the Arctic require the U.S. to readjust its posture, specifically focusing on countering anti-access area denial (A2AD), improving surveillance and communication, and preparing for electronic warfare and cyber conflict.

The northern approaches to U.S. territory also make the Arctic a growing concern to homeland defense for NORAD, given the changing environmental conditions and the increased mobility of nuclear-capable submarines.[33] Neither U.S. SOF nor conventional forces are well-positioned for Arctic operations, limiting deterrence and rapid response capability. Most importantly, the Arctic region in the UCP is currently divided between NORTHCOM and European Command (EUCOM), creating strategic confusion.

Recommendations

1. Create a Department of Civil Resilience

Efficiency and cost savings are essential with the looming federal budget cuts and a no-growth environment. DHS must focus on border security and geographic homeland integrity, prioritizing illegal migration, drugs and narcotics, and transportation security. Civil protection and resilience must be separated from LE hard security to flatten DHS. DHS should offload disparate sub-organizations to a new Department of Civil Resilience (DCR) to address national emergencies and infrastructure resilience. Organizations such as the Federal Emergency Management Agency, the Office for Civil Rights and Civil Liberties, Health Security, and the Cybersecurity and Infrastructure Security Agency should be removed from DHS and absorbed into the DCR. Separating these functions also postures the U.S. to respond to biological emergent technologies.[34] This functional split increases the president's operational control and flattens structures for increased preparedness, agility, and response times.

Creative adjustment also allows NORTHCOM and NGB to augment both DHS and the newly established DCR with military personnel when necessary. For deeper integration, the chief of the NGB and the NORTHCOM commander serve as the deputy

> *Department of Homeland Security should offload disparate suborganizations to a new Department of Civil Resilience to address national emergencies and infrastructure resilience.*

secretaries of DHS and DSCA, maneuver and support, respectively, to ensure efficient joint force management in domestic security and resilience operations. This matrixed organizational structure allows for the easy integration of Title 32 NG hard-security capability into domestic efforts, including NG SOF placement in LE operations. Integrating NG SOF adds a valuable cross-training opportunity to build an interagency C-I2N organization that leverages SOF access, bettering DHS's ability to counter gray zone activities and IW. Moreover, corruption has plagued the U.S. Customers and Border Patrol (CBP), as internal oversight mechanisms have repeatedly failed to address misconduct within the CBP.[35] As an ancillary benefit, integrating NG SOF and U.S. Special Operations Command (USSOCOM) into the CBP mission may mitigate corruption, as culturally distinct SOF units would remain separate from regular agents, providing additional oversight.

USSOCOM is the C-VEO coordinating authority for the DoD.[36] The ability to activate NG units, including SOF, into DHS ameliorates the need to invoke the Insurrection Act, a likely unsustainable policy. The U.S. must meet these new priorities with innovative and sustained means. In other words, countering TCOs operating in the U.S. requires an enduring security posture that an FTO designation does not resolve and the Insurrection Act cannot provide.

2. Realign Mexico Under U.S. Southern Command

Mexico's security responsibilities should shift to U.S. Southern Command (SOUTHCOM), aligning U.S. regional strategy with

sociocultural human domain tenants and a multilateral approach to Latin America. Not only does SOUTHCOM specialize in security partnerships and intelligence sharing in Latin America, but its theater special operations command's (TSOC) cultural expertise will allow for a unified approach to providing SFA, foreign internal defense (FID), and special reconnaissance for IW core activities. SOUTHCOM's conventional and SOF-subordinate commands have resources and experience in training, language proficiency, and counterinsurgency operations in Latin America.

Additionally, this aligns with interagency geographic responsibilities in the WHEM, such as the U.S. Department of the Treasury, Department of State, the National Security Council, and the CIA.[37] This realignment will facilitate stronger capacity-building and SFA while meeting the requirement that "seams...should not split areas of strategic interest or exacerbate demographic differences."[38] By placing Mexico under SOUTHCOM, multilateral SFA, stabilization, and FID are better leveraged with existing resources—a more responsible use of taxpayer funds. Transferring responsibility for Mexico to SOUTHCOM does not diminish the defense-in-depth strategy; it strengthens it. Early warning must come from organizations with the intelligence capability, resources, and expeditionary expertise to operate in Latin America. Allocating assets by authorities, i.e., border security versus military operations in Mexico, ensures strategic clarity in supported/supporting command relationships and interagency handover coordination when required.
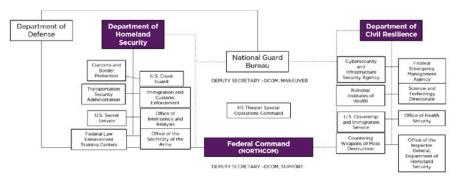
3. Establish a U.S. Arctic Command

To complete this restructuring, Arctic security responsibilities should shift from NORTHCOM to a newly established Arctic-region COCOM. This shift is necessary as Arctic security becomes increasingly critical to U.S. strategic interests, requiring a dedicated command posture. Under this realignment, an Arctic Command

(ARCOM) headquartered in Alaska would assume responsibility for Canada, Iceland, Greenland, and the area north of the Arctic Circle. This restructuring positions SOF to lead future Arctic challenges. Equipment procurement, placement, and access are critical to defeating enemy A2AD. Establishing an Arctic TSOC dedicated to polar security will drastically increase the speed at which the U.S. sets the theater in cooperation with Arctic partner nations. SOF's ability to integrate technology and serve as an incubator will be critical to adapting to the harsh realities of polar security. Procurement and acquisition are crucial, and the speed of innovation and ability to leverage the commercial sector will allow the necessary inputs into conventional forces to enhance the means through which the joint force operates. Furthermore, SOF's core activities of countering weapons of mass destruction, direct action, hostage rescue and recovery, and special reconnaissance all have a direct nexus within the Arctic region.

The logic of our current approach is backward: Department of Homeland Security and National Guard Bureau have the domestic authorities and expertise, yet NORTHCOM, Title 10, remains the lead military element.

Conclusion

The SOF community and the national security enterprise are currently at a reflection point. The security environment no longer justifies NORTHCOM's existence in its current form. To prioritize cost-cutting efficiencies, NORTHCOM should officially shift into a functional command by realigning Mexico under SOUTHCOM, establishing ARCOM, and restructuring DHS to focus solely on Homeland Security while offloading misaligned agencies. These reforms would clarify authorities, eliminate redundancies, and
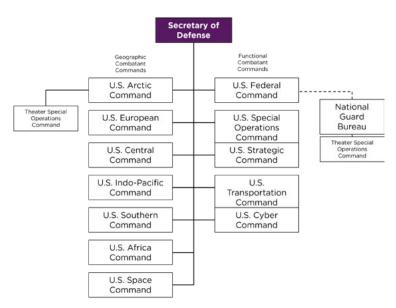
Figure 2. Proposed Department of Homeland Security, HS, Department of Civil Resilience, National Guard Bureau, and Federal Command (NORTHCOM) Relationship. Source: Author

position the U.S. for future security challenges while marshaling SOF competencies to leverage their capabilities in IW, stabilization, placement, access, and operations in all-weather environments. By transitioning NORTHCOM into a functional command rebranded as Civil or Federal Command, realigning Mexico under SOUTHCOM, and establishing ARCOM, the U.S. can better address emerging security threats while reducing security fault lines in the command plan.[39] See Figure 2.

Moreover, Title 32 allows for full integration with DHS just as SOUTHCOM and its subordinate TSOC authorities and expertise allow for effective non-lethal targeting and SFA. Instead, the logic of our current approach is backward: DHS and NGB have the domestic authorities and expertise, yet NORTHCOM, Title 10, remains the lead military element. Meanwhile, the NG diverts from its core functions, instead focusing on foreign policy through the State Partnership Program, redirecting the NG from its intended role and wasting resources meant to protect U.S. territories.

The political sensitivities of a perceived North American coalition prevented adaptation in the past. However, the need for preferential treatment disappears after eliminating the North American area of responsibility and restructuring responsibility into three distinct areas: Latin America, the U.S. Homeland, and the Arctic. In other

Figure 3. Proposed U.S. Combatant Commands. Source: Author

words, this construct prioritizes strategic necessity over political sensitivities while mitigating the potential political insult to Mexico and Canada. Most importantly, this realignment streamlines the UCP for new priorities, reduces redundancies, cuts costs, and optimizes resources. See Figure 3.

The time is right for change. Marrin points out that the 1995 and 1997 National Intelligence Estimates correctly identified civil aviation vulnerabilities and an apparent terrorist threat.[40] Nevertheless, he asserts that despite solid intelligence, it had little to no effect on policy. The failure was that "elected officials...were unwilling to take the...necessary steps."[41] Before 9/11, our security structure did not fail to see threats; it failed to adapt. The irony is that when structural reform is most needed, the structure itself prevents it.

Throughout history, the U.S. has faced critical inflection points in the national security strategy, moments when innovation was not only necessary but possible. B. H. Liddell Hart asserts that "Moltke reached a clearer, and wiser, definition in terming strategy 'the

practical adaptation of the means.'"[42] Organizational structure is a means to achieve our ends. From 1986 to 1987, reforms in the special operations structure followed the failures of Operation DESERT ONE, leading to the creation of USSOCOM.[43] After the events of 9/11, the U.S. reorganized at another inflection point. Nearly 25 years later, the U.S. stands at yet another crossroads, in front of an opportunity for adaptation that only occurs once a generation.

About the Author

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SEEC and You Will Find: The Need for a SOF Enterprise Education Catalog

By Jeff E. Edwards

Introduction

Special Operations Forces (SOF) military and civilian personnel supporting United States Special Operations Command (USSOCOM) require access to specialized, focused education to enable success in a rapidly changing environment. Many opportunities already exist through a network of Department of Defense (DoD) academic institutions and partner universities. However, understanding all that is possible is not as simple as a Google search—but it could be. The development of a SOF Enterprise Education Catalog (SEEC) would quickly inform personnel of education opportunities, optimize existing avocational education toward organizational mission needs, assess critical education gaps, and identify redundancies to achieve greater efficiency educating the force.

Mission-Focused Education

An enterprise catalog of this design focuses more on USSOCOM's avocational education needs than individual education for credit, degrees, or personal career advancement. Although a SEEC presents education available to individuals, the goal is for units and organizations to quickly find specialized, topic-focused education enabling mission success. While the process can also incorporate training, the focus is on education from the existing network of DoD academic institutions, to include service-owned and joint institutions as well as academic partners. The education is ultimately subject-, topic-, or theme-based (not general) for motivated adult learners actively employed by USSOCOM. This is not geared toward general degrees in engineering, social science, mathematics, etc. Instead, the focus is on specialized topics, such as artificial intelligence (AI), big data, cyber warfare, irregular warfare, operational planning, staff support, resource management, and challenges in an ever-changing environment.

Speed of Need

The phrase "speed of need" appears in the Joint Special Operations University (JSOU) curriculum development vernacular, but what does it imply or acknowledge? A SOF professional faces a wide range of expertise needed for mission success. Requirements for focused, specialized education can appear at any time, and the rigorous tempo of the SOF professional makes time a cherished commodity.

Therefore, how the education is delivered must be one of the first considerations. If the target audience is deployed around the world, a virtual or fully online offering is likely the more appropriate solution as long as it can still achieve the desired learning outcomes.

Sometimes, the desired level of learning is higher than the method of instruction can properly facilitate. Examples include when courses require practical exercises, culminating test events, or collaborative

The level of knowledge desired significantly impacts the required investment of time.

work to fulfill that level of learning. Other courses, especially at the senior leader level, benefit from in-person networking and mentorship from past and current commanders. Therefore, an online version is not always the answer because students could lose a significant benefit ingrained in the course.

The providing institution knows its audience, particularly the day-in-the-life of a typical student, to know what time they have available. The level of knowledge desired significantly impacts the required investment of time. Often, fully employed adult learners must balance life and education, choosing what is "good enough" or sufficient to succeed. Many times, the foundational and intermediate levels of knowledge are chosen in exchange for reduced commitments in time.

Lastly, the frequency of the course offerings must also fall within the appropriate windows, or training cycles, for that target audience. Clarity in outcomes is key. Expectation management not only enables student satisfaction but also ensures resources are used efficiently. It is after fully acknowledging these considerations that the minimum data fields are apparent to facilitate a useful and lasting SEEC.

SEEC's End State

The full operating capability of a proposed SEEC includes:

1. A commercial web page search engine tied to a catalog database searchable by any student, supervisor, or leader in USSOCOM

2. Administrative contributor accounts provided to each academic institution in the education network to update fields and promote courses

3. A simplified format and process for institutions to easily maintain current course offering information

4. A vcomplete database of offerings enabling USSOCOM to assess what is available, find redundancies, and identify gaps to create a more thorough, yet efficient, educational network to meet mission needs

The completeness and simplicity of the solution ensures lasting utility. The process is designed to require minimal effort for optimal benefit.

SOF Educational Focuses

Section 1D of the JSOU 2024 *Special Operations Research Topics* booklet offers three questions the SEEC addresses.

Is current education and training adequate to prepare for strategic competition?

The 2025 USSOCOM publication titled *SOF Renaissance* notes strategic competition requires "countering our adversaries' use of statecraft by working day-to-day alongside allies and partners in more than 80 countries to build partner capacity, execute irregular warfare concepts, provide unilateral options, and counter sophisticated adversary strategies below the threshold of armed conflict." Using this definition, a list of applicable topics can be generated. However, the challenge remains to find existing education that meets and fulfills the required knowledge set. A SEEC is a potentially invaluable tool to perform such needed queries.

At present, each institution is researched individually to find what is available. Course catalogs for all institutions are maintained separately, not tied to a joint search engine. A general search on Google may eventually reveal a course and a school, but a SEEC would permit useful filtering across the entire SOF enterprise to efficiently find courses tailored or related to a focus such as strategic competition.

Is the content, type, and timing of education appropriate to meet the requirements of SOF?

A catalog database across the entire education network also enables successful analysis at a higher organizational level. USSOCOM requires the ability to assess what is available to match what is needed. Aggregated data, including all the proposed fields and useful meta tags, enables quick identification of all courses addressing specific interests. Each listing comes with an immediate link for further exploration at the offering institution's website. In this example, a SEEC not only points to the course available but also details the level of learning, time to execute, method of instruction, and other key variables to quickly aid such an assessment.

JSOU is unique among military educational institutions, as it is the only one that reports directly to USSOCOM. Where should JSOU's focus be?

JSOU's strength is its ability to quickly address gaps with tailored SOF-peculiar education to meet the changing needs of USSOCOM. The knowledge of offerings across the entire education enterprise would improve JSOU's ability, as stated in the 2016 Charter, to conduct "specialized courses of instruction not normally offered in other professional military education programs."

For example, if design-related education is offered at multiple institutions but all are time-intensive semester-long programs, SOF professionals cannot attend—a short course tailored to SOF may prove necessary. This may look like a week-long, in-person, introductory course or an online course to better suit students.

A SEEC also reveals redundancies across the education enterprise. If an education event is tied to an existing program, certificate, or degree, it could be counterproductive to eliminate or consolidate among the institutions. However, the opportunity certainly exists to create a more collaborative and efficient effort across that network for courses appearing to fit the same mold.

> *A SEEC also reveals redundancies across the education enterprise.*

Distinguishing Variables

The right variables can effectively distinguish one offering from another. Most importantly, the data should be tied to categorical responses, avoiding an excess of unique fill-in responses. This permits easier sorting—a significant, necessary feature of the SEEC.

A downside to this approach is that it forces a participating

institution to generalize the description of each offering. For example, both a 10-minute online microlearning module and a 3-hour lesson fall into the proposed "microlearning" category. However, there is arguably more value distinguishing between the short offerings versus the longer ones that take days, weeks, and months that the student may not have available.

The goal is to enable top-level visibility of courses through simple, reasonable variables common to all institutions in the enterprise. Once the student, leader, or organization discovers a course or event, they can dive deeper into the specifics by following a provided link back to the offering institution.

For USSOCOM's purposes, the SEEC should have a total of nine fields consisting of four categorical responses and five fill-ins specific to the institution.

Duration

Organizations know the time allotted to education is often in sacrifice of personnel to their ongoing mission, expecting a real return in investment. How much time to spare for that end goal must be weighed against time available and mission needs.

With the SEEC, each academic institution identifies the number of hours, days, or weeks to complete each offering. The binning of this data enables all to quickly sort between short and long course options. These bins include: Microlearning (less than half an hour), Day (1–8 hours), Days (9–40 hours), Weeks (41–160 hours), Few Months (1–3 months), and Several Months (3–6 months). Degrees or programs longer than six months should be broken down into the respective courses that make the degree or program. If the courses are not taken separately, it should be identified in the prerequisite data field.

Prerequisite

This is a yes or no answer provided by the institution. This informs the student if the event is readily available or requires additional steps and time to attend.

Level

The amount of time invested often impacts the expected level of knowledge. A student venturing into a multiyear doctorate achieves a mastery that cannot compare to any short course. However, if the short course enables "good enough" knowledge to foster mission success while meeting the time the organization is willing to commit, the short course has the immediate and/or greater return on investment. For example, a week-long course in AI may only achieve entry-level/introductory/beginner familiarity versus a semester-long course. But if entry-level familiarity is enough to succeed, the week-long course is the appropriate choice. For the SEEC, institutions identify course levels from following:

0   Microlearning

1   Course: entry-level/introductory/beginner

2   Course: intermediate level

3   Course: mid-level/advanced

4   Course: expert/senior-level

5   Program: (multiple courses)

Delivery Method

SOF professionals and their enablers deploy worldwide. Budgets and time are limited. Therefore, the method of instruction is critical. Also, learners have preferences and need the ability to sort education offerings by delivery method. For the SEEC, institutions identify the delivery method from the following:

1 Online only: self-guided (synchronous)

2 Online only: instructor-led (synchronous)

3 Blended: (mix of online, virtual, in person)

4 In person, classroom only

Additional required data (fill-ins), specific to the institution include the following:

Course Name

This is the full course name—void of acronyms—to enable a proper search.

Institution Name

This is the full name of the academic institution that offers and maintains the course, whether in person or online, at a main campus or satellite location. If partnered with another institution, it lists the primary provider or lead agency.

Subject (Primary)

This is the most essential variable. It can be a single word or phrase and is key to the search. Acronyms and shortened terms should be spelled out in full. For example, AI should be listed as artificial intelligence.
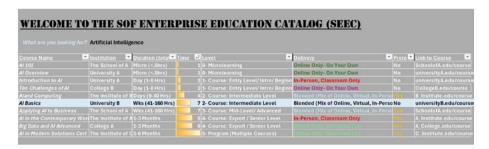
Tags

These list all appropriate meta tags for a course. This may include secondary topics, lessons within the course syllabi/agenda, the office that offers the course, associations, job codes and career specialties that benefit, and more.

Link

This is a direct link to the course's information, if posted and available online. The intent is to allow students to go directly to a site for further information and registration.

See Figure 1 for a prototype example showing how a simple word search would produce a complete list of related courses from multiple institutions.

WELCOME TO THE SOF ENTERPRISE EDUCATION CATALOG (SEEC)

What are you looking for? **Artificial Intelligence**

Course Name	Institution	Duration (total)	Time	Level	Delivery	Prere	Link to Course
AI 101	The School of A	Micro (<.5hrs)	1	0- Microlearning	Online Only- On Your Own	No	SchoolofA.edu/course
AI Overview	University A	Micro (<.5hrs)	1	0- Microlearning	Online Only- On Your Own	No	universityA.edu/course
Introduction to AI	University A	Day (1-8 Hrs)	2	1- Course: Entry Level/ Intro/ Beginn	In-Person, Classroom Only	No	universityA.edu/course
The Challenges of AI	College B	Day (1-8 Hrs)	2	1- Course: Entry Level/ Intro/ Beginn	Online Only- On Your Own	No	CollegeB.edu/course
AI and Computing	The Institute of E	Days (9-40 Hrs)	4	2- Course: Intermediate Level	Blended (Mix of Online, Virtual, In-Perso	Yes	B_Institute.edu/course
AI Basics	University B	Wks (41-160 Hrs)	7	2- Course: Intermediate Level	Blended (Mix of Online, Virtual, In-Perso	No	universityB.edu/course
Applying AI to Business	The School of A	Wks (41-160 Hrs)	7	3- Course: Mid-Level/ Advanced	Blended (Mix of Online, Virtual, In-Perso	Yes	SchoolofA.edu/course
AI in the Contemporary Worl	The Institute of A	1-3 Months	8	4- Course: Expert / Senior Level	In-Person, Classroom Only	Yes	A_Institute.edu/course
Big Data and AI Advanced	College A	1-3 Months	8	4- Course: Expert / Senior Level	Online Only- Instructor Led	Yes	A_College.edu/course
AI in Modern Solutions Cert	The Institute of C	3-6 Months		5- Program (Multiple Courses)	Online Only- Instructor Led	Yes	C_Institute.edu/course

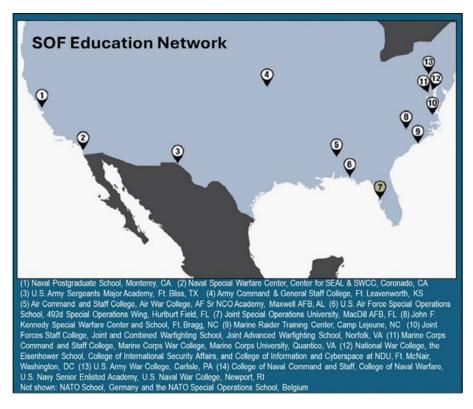**Figure 1:** A prototype visual of the proposed SEEC. Source: Author

Long-Term Sustainment

Participating institutions enter each course one time using a unique author/administrator account. The initial investment would be the few hours expected to enter each cataloged course and fill in the nine required data fields. After that, a quarterly update is recommended to add or delete courses as needed. Any greater data requirements than those proposed jeopardize the ability to maintain the SEEC. The intent is to enable basic visibility without adding an administrative burden to the participating institutions.

Defining the Enterprise

The proposed SEEC is intended to facilitate knowledge and efficiency in education across the SOF education network. A general overview of this education network is shown in the *JSOU Factbook* and may include additional partner institutions. The recommendation

is to include courses available to USSOCOM personnel and in the interest of USSOCOM, regardless of institution as long as they are willing to contribute. See Figure 2.

Figure 2: Map of SOF Education Network. Source: *JSOU Academic Year 2021 Factbook*

Incentive to Participate and Maintain

Participating in the SEEC by providing one-time, minimal catalog data gives institutions visibility to everyone, from potential students and units with specific education needsto the senior leadership at USSOCOM. Being included in a one-stop, centralized, enterprise-wide catalog also creates visibility to an audience that otherwise may not know to visit an institution's website and do the necessary research of its catalog.

Education Ecosystem

The JSOU 90-Day Assessment, published January 15, 2025, identifies an external line of effort to "reimagine SOF-peculiar educational governance and how to best leverage different institutions to achieve maximum return on time invested." The SEEC serves as the primary dashboard informing any enterprise-wide synchronization of education efforts.

The Need Exists Today

As the U.S. DoD aims to enable warfighters with greater efficiency, an immediate case can be made for a SEEC that enables academic institutions to reduce redundancies, identify gaps in education critical to warfighters, and govern a team effort in education. The key to its success is ensuring the SEEC is accessible to all for viewing, accessible to edit by contributing institutions, and easy to maintain with the minimal, basic data proposed.

If such an education search function is fixed to one location and available to all in the enterprise, it becomes the primary one-stop site for institutions to promote courses and for students to find them. Institutions that buy into this concept have their courses available for search, viewable to both potential students and USSOCOM leadership. Those who do not participate maintain data in their respective stovepipes, needlessly missing the opportunity to inform the community they faithfully serve. The need exists and there is a path to make it happen. Such a collaborative tool will enable personnel to find the education opportunities they seek.

About the Author

Jeff "Eddie" Edwards is the Director of Institutional Effectiveness at JSOU. He joined JSOU in 2011 and developed the university's long-standing Quality Assurance Program.

Edwards graduated from the U.S. Military Academy at West Point in 1998 and served in the U.S. Army as an Air Defense Artillery (Patriot) officer at Fort Bliss, Texas. In 2005, he joined the Fort Bliss Directorate of Combat Developments to provide program analysis for future Air Defense systems. Between 2006 and 2011, Edwards served as an Operations Research Systems Analyst for the U.S. Army Training and Doctrine Command Analysis Center at the White Sands Missile Range, New Mexico.

He holds a bachelor of science in political science, a bachelor of arts in criminal justice and homeland security, a master of science in industrial engineering, and a master of fine arts in creative writing.

PART II

PEOPLE

BACKGROUND: USSOCOM seeks to examine the balance between its Title 10 U.S. Code § 167 service-like responsibilities and 10 U.S. Code § 164 combatant command responsibilities and must make the fundamental shift toward a more significant focus on service activities in the coming years.

FOCUS: Execution of USSOCOM's 10 U.S. Code § 167 service-like responsibilities in support of TSOC campaigning 10 U.S. Code § 164.

QUESTION: How can SOF improve the execution of its service-like responsibilities in regard to program, planning, budget, and execution; cost-assessment program evaluation; and doctrine, organization, training, materiel, leadership, personnel, facilities, and policy?

Curriculum for High-Stakes Environments: Developing Curriculum with Special Operations Practitioners

By John F. Cabra, PhD, Jordan Alexander, MBA,
Michael Clark, MA, Brian Gould, MS,
and Anthony Lawson, MBA

PEOPLE

Introduction

The evolving landscape of Special Operations Forces (SOF) necessitates an increased focus on rigorous academic discourse to better understand and adapt to emerging operational complexities. Currently, there is a gap in this discourse involving curriculum development, with an insufficient level of engagement that hinders the full potential of academic exchange.[1] To be sure, discussions in the classroom must be robust and go beyond surface-level analysis.

This is where creative thinking becomes essential. It plays a pivotal role in igniting innovation, expanding perspectives, and encouraging critical thinking. By infusing academic discourse with creativity, instructors can create an environment where dialogue is dynamic, inclusive, and continually evolving—ultimately advancing knowledge. In doing so, SOF personnel are better prepared to navigate complex challenges with greater insight. Furthermore, creative thinking is actively supported by the role of Joint Special Operations University (JSOU) as the United States Special Operations Command (USSOCOM) premier academic institution, where intellectual exchange and innovative thinking drive research and curriculum development tailored to the ever-changing needs of the SOF community.[2]

A novel approach to creative thinking—developed by select members of the JSOU special operations (SO) faculty—integrates the principles of creativity sciences into the SO curriculum development. This initiative underscores a commitment to enriching the learning experience by fostering innovative problem-solving and adaptive thinking within a specialized educational context. Central to this approach is the implementation of a Creative Problem Solving (CPS) design framework, which the JSOU SO faculty meticulously tailored to address the unique demands of SO training. The framework facilitated a collaborative co-development process that involved engaging SO subject matter experts (SMEs) in the iterative

A novel approach to creative thinking—developed by select members of the JSOU special operations faculty—integrates the principles of creativity sciences into the SO curriculum development. This initiative underscores a commitment to enriching the learning experience by fostering innovative problem-solving and adaptive thinking within a specialized educational context.

design and refinement of curriculum content. This partnership between the curriculum developers and SMEs was instrumental in crafting a course that not only aligned with operational needs but also stimulated creative engagement and critical thinking.

The CPS framework emphasizes a structured-yet-flexible creative process[3] and was applied to two contexts. These contexts focused on the individual function (do, decide, direct) and the organizational function (theater, regional, platform). By centering the design process around these elements, the team aimed to enhance the efficacy of SO training and support dynamic learning experiences that mirror real-world complexities.

The team noted opportunities and challenges encountered during the curriculum development efforts and examined insights into the practical application of creativity sciences within the SO education domain. Ultimately, their analysis presents a perspective on integrating creative problem-solving methodologies in curriculum development, a valuable contribution to the field of learning design.

The Design Team

The effort brought together a diverse group of SMEs from SO areas: Participants came from multiple organizations across the industry, representing a broad spectrum of expertise. The core

curriculum design team used a comprehensive list of pre-vetted SMEs, which ensured a wide range of perspectives from theater special operations commands (TSOCs) and service components. This approach provided a knowledge base closely aligned with management challenges within these organizations.

Coordination

The workshop space was arranged to facilitate both collaborative and independent work:

- Separate areas were designated for small group discussions and quieter work.

- Visual presentation tools such as whiteboards and flip charts were provided to support brainstorming and idea screening and selection.

- Ample supplies of sticky notes and markers were available for generating and organizing thoughts.

The Curriculum Development Process

A collaborative approach to curriculum development was designed to emphasize engagement, creativity, and critical thinking. The faculty structured the process to ensure iterative refinement and alignment with both academic requirements and SME needs. Key steps included:

- **SME Selection and Orientation:** Identifying experts and providing context for curriculum development

- **Framework Introduction:** Presenting adult education principles and the CPS FourSight model[4]

- **Creative Climate Establishment:** Engaging in team-building activities and setting working group norms

- **Conceptual Development:** Introducing the program framework and breaking it into manageable components

- **Iterative Refinement:** Conducting multiple rounds of small group activities to develop and refine the mission concept (MICON) and concept of operations (CONOPS)

- **Feedback and Consensus:** Facilitating large group feedback sessions and a final vote on recommendations

- **Reflection:** Concluding with an after-action review (AAR) to identify lessons learned and areas for improvement

This structured approach emphasized collaboration, creativity, and iterative refinement to produce well-conceived and widely accepted curriculum designs.

Mindset

The conceptual frame of the academic program was introduced to organize the workshop into teams for an iterative process. This phase encouraged safe creative exploration and experimentation that acknowledged the inherent messiness of the process. However, it was communicated to the SMEs that the process would feel like a winding road. A visual was shown (see Fig. 1) that depicted the emotional dynamics that could potentially emerge as the participants engaged in an iterative and messy creative process they were not accustomed to.[5] The visual served as a heads-up and a way to periodically touch base with the group to determine if workshop activities needed adjustments to mitigate any frustrations.

To further foster a creative workshop climate, icebreakers and team-building activities were included in the design. One activity, called "Picasso-in-a-Bag" and ideally conducted in pairs around a table, achieved four goals. See Appendix 1 and Figure 2.

First, it served as an engaging icebreaker that promoted laughter and enhanced creativity by fostering a positive mood.[6] Second, it demonstrated the value of deferring judgment;[7] initial reactions to the Picasso-in-a-Bag activity are often hesitant, thereby introducing the benefits to play, vulnerability, and trust. Third, it primed the group for a mindset conducive to navigating the winding road. Finally, the team incorporated this icebreaker into participant introductions, which were spread throughout the five days of the SO curriculum development workshop.

Following the icebreaker, working group norms were established on a flipchart page, which built upon the dynamics introduced during the mindset development exercises. The team had its starter list of norms, such as defer judgment, stay open, and be curious. Participants were then invited to add to the list. This step was intended to create a collaborative and respectful environment for the iterative work that followed. The SMEs, by their nature and high-stakes assignments, are highly opinionated and analytical; Sometimes, their form of communication is strongly assertive.

	• Name • Background • Expertise
What you would like to "buy" or get from the group.	What can you "sell" or offer to the group.

To enhance participants' collaboration in small groups, the team administered the FourSight assessment,[8] a tool used to elucidate individual and team problem-solving preferences and strengths. It delineates four distinct cognitive styles, each associated with a specific phase of the problem-solving process. See Appendix 2.

- **Clarifier:** Emphasizes understanding and defining the problem by gathering pertinent information and asking probing questions to ensure clarity

- **Ideator:** Focuses on generating creative solutions and ideas, characterized by innovative thinking and effective brainstorming techniques

- **Developer:** Engages in refining and structuring ideas, concentrating on practical aspects such as planning, organizing, and detailing

- **Implementer:** Dedicated to executing plans and ensuring effective implementation of solutions

The team selected the FourSight assessment because its cognitive style preferences align with the four stages of the CPS process, which enabled them to identify the group's thinking tendencies in accordance with FourSight principles. In small group work during the workshop, awareness of these cognitive styles would help the SMEs significantly improve how they would work together throughout the week and address issues related to group dynamics and styles under stress when faced with multiple approaching suspensers.

Foundation

In their presentation to the working group, the team provided background information on key concepts, including andragogy and outcomes-based military education (OBME) as specified by the Joint Staff and JSOU's Terms of Reference.[9] A military Joint Staff is a team of senior officers from different branches of the armed forces who collaborate to plan and coordinate operations. Their main goal is to promote effective communication and teamwork among the U.S. Army, Navy, Air Force, Marines and Space Force, especially during joint missions. The team explained how military terms correlate with academic terminology and introduced a concept statement and sketch that combined visual depictions with key mission components—an approach familiar to the group.

The team sought to understand what practitioners in the Department of Defense (DoD) should know, ultimately creating a framework of knowledge domains. These domains function similarly to a project management work structure, which organizes large topics into smaller and more manageable pieces.

Within this framework, the team identified three major knowledge domains relevant to the area of study. To determine which macro knowledge domain participants considered most critical, participants were asked to prioritize these domains. For

each selected priority, the team then inquired whether practitioners should "Be," "Know," or "Do."[10] This "Be, Know, Do" framework is commonly used in military training and correlates to different categories of Bloom's Taxonomy.[11]

The team presented participants with a menu of topics, with major categories representing knowledge domains and subcategories denoting areas of expertise. For example, an area of expertise might involve understanding industry-specific terms unique to the field.

Round One: Mission Concept

MICON was a familiar framework for the SMEs. MICON is a conceptual tool used by SO detachments to outline initial ideas for operations.[12] Here MICON served as a high-level sketch that facilitated discussion and preliminary approval before moving into more detailed planning. Presenting the MICON concept allowed the planners to develop a cohesive understanding of their objectives and align their efforts effectively. An outline of activities the team used to guide the group in developing their initial curriculum concepts is detailed below:

Course Target Audience

Knowledge Domain x Priority x Be/Know/Do Emphasis

Area of Expertise (3–5) areas of focus

Phased Approach

    Program Learning Level (Shot Group)

    Method

        Online/In Person/Hybrid

        Form Factor Categories

        Time Constraints

> *With a well-defined knowledge domain, key areas were prioritized that embodied the essential "Be, Know, Do" framework, enabling participants to not only acquire information but also to embody it in their professional lives.*

The instructional team designed the MICON activity to accommodate a specific target audience, ensuring the content resonated with their needs and aspirations.

With a well-defined knowledge domain, key areas were prioritized that embodied the essential "Be, Know, Do" framework, enabling participants to not only acquire information but also to embody it in their professional lives. The initial curriculum concepts concentrated on three to five pivotal topics that equipped learners with the skills they needed to thrive. The team complemented this targeted approach with a phased methodology allowing participants to progressively build on their knowledge and ensure a solid foundation before advancing to more complex concepts. This MICON activity utilized a shot-group approach, which grouped participants by similar experience levels for more tailored interactions and enhanced learning outcomes.

The delivery method was flexible, offering options for online, in-person, or hybrid participation that accommodated various preferences and schedules. Additionally, the initial curriculum concepts were structured around specific form factor categories to enhance engagement and facilitate different learning styles. The team also recognized the importance of time constraints and therefore made sure the program was efficient and respectful of participants' busy schedules while still delivering comprehensive content designed to deliver success. Simplifying complex ideas, visual tools—diagrams, graphs, and sketches—were emphasized so

the SMEs could point to and discuss concepts collaboratively. This approach helped them focus on thinking and creating rather than getting bogged down in extensive writing.

The first component of the MICON focused on identifying the target audience. The team presented a chart categorizing positions by function and echelon within their organizations, emphasizing the need to initiate discussions around these roles. The objective was to clarify what a program aimed to address based on the knowledge gaps between what individuals at various echelons should know versus what they currently did know.

Participants used a suggested framework to outline and highlight relevant positions. The framework fostered good dialogue and allowed for easy visualization of their ideas. A structured approach also facilitated layering target audiences across different programs to ensure comprehensive coverage without being overly broad. The team encouraged specificity in defining the target audience, for example, correlating military echelons with rank structures and organizational roles. Each echelon had distinct responsibilities and knowledge bases, which the SMEs were expected to articulate clearly. Overall, the intent was to create a visual representation to help the SMEs understand roles, responsibilities, and knowledge distinctions within their organizations, permitting them to refine their target audience descriptions iteratively as subsequent concepts were developed.
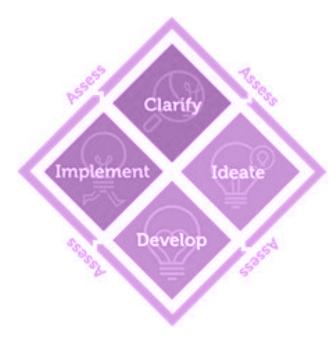
The team then organized groups around four doctrinal functional components of command and control related to the mission set and

Participants used a suggested framework to outline and highlight relevant positions. The framework fostered good dialogue and allowed for easy visualization of their ideas.

provided explanations of the functions and their relevance to real organizations. SMEs were next allowed to choose the group they were most interested in using, an approach called "vote with your feet." See Appendix 3.

The Creative Problem-Solving Process

To facilitate group dynamics, the team aligned the process with the FourSight model (See Fig. 3) and provided personality profiles. See Appendix 2. This approach helped participants understand their comfort zones and stressors during the design phase. The team also offered strategies for navigating potential conflicts, emphasizing such discussions could be constructive.

While the team relied on the SMEs' passion and experience, they also recognized that time constraints limited the session. To

Figure 3. Creative problem-solving process. FourSight model developed by Dorte Nielsen and Sarah Thurber (2011).

address this, they conducted preparatory meetings, allowing participants to engage with the content prior to the workshop.

In alignment with industry practices, the team focused on the organization's vision and mission, believing that individual learners should understand how they fit into the broader context, which balanced personal and collective knowledge to achieve success. Each group's findings were shared with the larger cohort, incorporating a feedback loop that included silent feedback. See Appendix 4. The SMEs used feedback to refine and enhance their concepts.

Round Two: Concept of Operations

In the second round, groups considered the feedback received and developed more detailed CONOPS.[13] The revised concepts were presented to the large group through another round of silent feedback. See Appendix 4.

Round Three: Program of Instruction

In the third round, groups refined their concepts based on the latest feedback and presented their final concepts to the large group in a facilitated discussion using a program of instruction (POI). A POI provides a detailed description of the course/phase content, duration of instruction, and resources to conduct courses/phases.[14] The groups made explicit the reasons for accepting or rejecting various aspects of the concepts.

The instructor team conducted a Roman vote (i.e., a thumbs-up, thumbs-sideways, or thumbs-down voting method) to accept or reject the recommendations of the small groups. Each member indicated their level of support: thumbs-up signified agreement; thumbs-sideways indicated neutrality or reservations ("It's good enough; I can live with it and want to move forward."); and thumbs-

down represented disagreement. The group proceeded only when all members signaled either thumbs-up or thumbs-sideways. If any thumbs-down votes were present, the instructor team facilitated discussion until all dissenting viewpoints were heard and a consensus to move forward was reached.[15] This voting process ensured a democratic and collective decision-making approach to finalizing the concepts.

Final Reflections

The innovative curriculum development approach significantly enhanced SOF education by seamlessly integrating diverse viewpoints and practical expertise. By engaging a wide range of SMEs from across the SO areas, the process ensured that the resulting curriculum reflects the multifaceted nature of SOF operations.

The structured-yet-flexible CPS framework allowed for the capture of varied perspectives, which led to a more comprehensive and operationally relevant educational experience. Applying the method's applicability could extend beyond SO training to other aspects of SOF education. Its emphasis on collaborative co-development and iterative refinement can be adapted to design curricula for areas such as tactical operations, intelligence gathering, or cross-cultural communication. To further improve the execution of SOF's service-like responsibilities, the instructor team could expand this approach by incorporating regular feedback loops from field operations, which would ensure that the curriculum remains current with evolving operational needs. Additionally, establishing a permanent cross-functional curriculum development team could facilitate continuous improvement and rapid adaptation of training programs across all SOF disciplines.

However, broader implementation within USSOCOM may face challenges, such as resistance to change, resource allocation, and

> *The innovative curriculum development approach significantly enhanced SOF education by seamlessly integrating diverse viewpoints and practical expertise.*

maintaining operational security. Opportunities include improved alignment between training and real-world operational needs, enhanced adaptability of SOF personnel, and the creation of a more cohesive learning ecosystem across USSOCOM.

To overcome challenges, USSOCOM could consider phased implementation, starting with pilot programs in select areas, and gradually expand based on lessons learned and demonstrated success. Ultimately, institutionalizing this collaborative and adaptive curriculum development approach, deeply rooted in creative problem-solving principles, will empower SOF personnel with the thinking skills and adaptability essential for navigating an increasingly complex and unpredictable operational environment. This methodology actively bridges the gap between academic discourse and practical application, which ensures that SOF training remains relevant and impactful.

By fostering a culture of continuous improvement by leveraging the expertise of both academics and practitioners, and embracing the JSOU-championed innovative spirit, USSOCOM can make certain that its workshops not only meet the demands of the modern battlefield but also proactively cultivate the creative problem-solvers necessary to shape the future of special operations. This commitment to innovative education is a strategic investment that will solidify SOF's position at the forefront of operational excellence and adaptive leadership.

Appendix 1: Picasso-in-a-Bag Activity

Note: These are tools used or developed by Knowinnovation. http://knowinnovation.com

Overview

This activity is best completed in pairs around the table. This activity's purpose is threefold. One, it is a fun way to break the ice and get the group to laugh. Studies have shown that a positive mood is correlated with increased creativity. Two, it is a way to bring to life the value of deferring judgment on each other and on oneself—the initial reaction to the Picasso-in-a-Bag activity is hesitancy and reluctance. This activity is a fantastic way to introduce play, vulnerability/trust, and begin to defer judgement. Third, the activity is connected to participant introductions that are done in waves throughout the week during the SO curriculum development workshop.

Output	Idea Time	Resources Needed	Set-up
• A fun portrait to add to the profile "Me" sheet.	• 15 minutes	• Slides (optional) of the instructions "Me" sheet • Brown paper grocery bag • Large printer paper • Sharpies	• If there are handles on the bag, cut them off • Slide one sheet of paper into each bag (keep the bag closed)

Instructions

1. Tell participants that you are giving all instructions prior to them picking up the bag.

2. Participants will pick a partner, preferably the person across from them.

3. If there is an odd number, form a triangle.

4. Tell participants when you tell them to start, they will open their bags, leaving the paper inside.

5. They will pick up their sharpie and place it on the paper.

6. They will now proceed to draw a portrait of their partner.

7. Ask them to capture as much detail as possible and take their time.

8. They should use a full sheet of paper.

9. They CANNOT lift their markers or look at their drawings—no peeking.

10. When they are done, simply close the bag, no peeking, and wait for everyone else.

11. When everyone is done tell them to share their picture and give it to their partner.

Facilitator Tips and Watchouts

- A terrific way to introduce this activity is to model what you want them to do.
  - This also creates the picture for the template profile sheet
  - However, DO NOT reveal your picture to them, their reveal should come first.
- Great photo opportunity, both while working on them, but more importantly, during the reveal. Invite JSOU-designated photographer.
- Some pairs will want to draw each other one a time. Both are fine.

Appendix 2: FourSight Problem-Solving Preferences

In the SO curriculum development workshop, participants are asked to work in distinct groups throughout the week. When the facilitators provide hourly suspense deadlines, this may cause tension among the small group members. This group dynamic stems from humans being natural problem solvers but do it in very different ways. So, working together can be rough or rewarding. It all depends on how well the participants know themselves as a thinker.

"The FourSight Thinking Profile is a scientific measure of thinking preference. It reveals how people naturally approach any kind of challenge that needs critical and creative thinking. It helps them to reflect on their own problem-solving style and understand why others might approach the same problem or opportunity so differently." (p. 1)

"Through analyzing more than six million data points on cognitive diversity in creative problem solving, Gerard Puccio from the Buffalo State University discovered that more than 80% of us prefer some types of thinking over others. He called those thinking preferences. When people understand how thinking preferences work, they can solve complex challenges more easily. Left unmanaged, however, thinking preferences can cause breakdowns and frustration." (p. 1)

"Ever notice how some people ask too many questions? Or have too many ideas? Or make things too complicated? Or rush to finish things too quickly? Those are thinking preferences in action. With FourSight, participants can see and manage their thinking preferences so they can become a more effective problem solver, collaborator and or innovator. They learn to appreciate differences, avoid blind spots, reduce conflict, and leverage everyone's best thinking to make better teams and get better results." (p. 1)

Appendix 3: Vote with Your Feet

Note: These are tools used or developed by Knowinnovation. http://knowinnovation.com

Background

Vote with Your Feet can be an energizer; it gets people up and moving but with content related to the challenge at its center. The activity can be used to highlight where participants might disagree or have conflicting views, which is often a good jumping off point for new thinking. It also can give insight into how people think or feel about an important MICON-related topic. It's a good data collection tool for organizing and facilitation teams.

Output

A visual distribution of where participants in the room might disagree around central topics to the workshop or the MICON areas they want to advance or develop.

Ideal time:

10 minutes-20 minutes

Resources Needed

- Signs to indicate each MICON area. Signs are placed around the room where participants can line up according to their interests.
- Marker
- Tape

Set-Up

1. Post signs in the four corners of the room.

2. Where the group is spread evenly between all four quadrants, or split on the extreme poles, there is an opportunity to explore a bit further. If groups are unevenly distributed, the facilitators can solicit volunteers to move to other groups.

Instructions

1. Instruct people to get out of their seats and form human bar charts based on which MICON topic is of interest to them.

2. You can ask people to make it explicit why they chose the respective MICON topic area.

Output	Idea Time	Resources Needed	Set-up
• Feedback (typically in the form of Post-its) for each group to review and incorporate, consider, apply as appropriate.	• 5 minutes per presentation	• Post-its • Sharpies	• Not applicable

Appendix 4: Silent Feedback

Note: These are tools used or developed by Knowinnovation. http://knowinnovation.com

Overview

During the first round of presentations, we like to give feedback to the teams around their ideas. The fastest way to do this is to pause after each set of presentations and ask participants to generate silent feedback for the team that has just presented. While feedback may be collected all together, we ask for Pluses first and collect the feedback in order, then concerns. We find that we get more positive feedback if we create a separate collection moment for pluses and only pluses, etc.

Instructions

1. Explain pluses and concerns (notes are written on a flipchart sheet).

2. Pluses are things you like about the idea.

3. Concerns are phrased as questions and preferably a "How might you?" or a "How to" question. Questions invite the human mind to generate an answer. If you have a concern to overcome...see below

4. Overcome- ideas to mitigate the concern, ask people to add it to the feedback or create a new Post-it note.

5. Move into the first presentation and after the presentation briefly re-explain highlighting the following:

   a) One idea or thought per Post-it.

   b) Mark pluses with a +, and concerns as questions or with a question mark.

   c) We encourage specificity. One piece of specific feedback is better than three pieces of very general feedback.

6. Prompt the group to write pluses, hold up their Post-its in the air, and the team will collect them.

7. Encourage participants to give as much feedback as possible.

8. After a minute, add concerns.

9. It is helpful to suggest overcomes when they have a concern; for example, "What concerns might you have for this team? Phrase them as questions. If you can think of a possible overcome, please use a separate Post-it and capture it."

Facilitator Tips & Watchouts

• It is beneficial to have up the flipchart sheet with the shorthand (+, C/?) for participants to reference.

• It is beneficial if one team member writes the name of the presentation that is going and at least one member of that team (we have found a large Post-it note works well - you can fold it in half and after pictures place the stack of Post-its inside).

• Place Post-its in order on a flip chart paper so pictures can be taken.

• Combine all the feedback into one stack and put it in the folded larger Post-it. During the next break, distribute to each team.

About the Authors

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Acknowledgments

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Beyond Evacuation: Leveraging Civil Affairs and Strategic Communication Capabilities of SOF for Effective Refugee Integration

By Major Christopher J. Higgins

Introduction

The 2024 Special Operations Research Topics (SORT) sets the tone for the Special Operations Forces (SOF) research agenda with the pledge, "We will 'Win'—every time, every place, in any environment. The 'SOF Way' is unconventional, irregular, asymmetric, asynchronous, and done alongside the U.S. Government [USG], interagency, as well as with Allies/Partners."[1] The 2021 Afghan Noncombatant Evacuation Operation (NEO) exemplifies how SOF capabilities can be strategically leveraged for refugee integration, now a critical function within complex humanitarian operations.

The rapid evacuation from Afghanistan during the U.S. withdrawal led to "approximately 88,500 Afghan nationals arriving in the U.S. as part of Operation ALLIES WELCOME (OAW). OAW is the coordinated effort across the federal government to support and resettle vulnerable Afghans."[2] By using the Afghan NEO as a foundational case to extract best practices, institutional shortfalls can be identified—and actionable recommendations can be developed—for future mass displacement events. This research explores how SOF bridges cultural and organizational divides in displacement scenarios through civil affairs (CA) and military information support operations (MISO) capabilities. Using strategic theory, behavioral science, and joint doctrine, structural gaps in refugee integration strategy are addressed. The resulting framework provides doctrinally aligned guidance for interagency planning, advancing SOF operational objectives and broader national resilience.

Afghan evacuation and resettlement in 2021 presented unprecedented challenges to USG strategic planning systems. These deficiencies underscore systemic interagency coordination gaps directly affecting national security, economic stability, and social cohesion. Aid agencies reported that "many of the newly arrived refugees face primarily housing and employment challenges. Some also experience cultural shock as they navigate through the intricacies of life in America."[3] These barriers compound societal tension, degrade institutional trust, and heighten vulnerability to radicalization and exploitation by malign actors. "Security has multiple and interdependent dimensions," said the United Nations (UN) High Commissioner for Refugees. "Expanded notions of human security recognize the importance of non-state agents and redefine a range of interventions as relevant to security. The awareness of these dimensions is fundamental to addressing the security concerns involved in refugee assistance."[4]

> *By using the Afghan NEO as a foundational case to extract best practices, institutional shortfalls can be identified—and actionable recommendations can be developed—for future mass displacement events.*

The 2024 SORT categorizes these pressures as nontraditional security threats—conditions that demand a whole-of-government response in which SOF offer specialized mitigation capabilities.

SOF's Relevance and Capabilities in Refugee Integration

SOF possess unique capabilities and experiences that can mitigate these challenges through proactive engagement in

refugee integration. The critical importance of cultural intelligence, linguistic competence, and interpersonal relationships in SOF missions positions these forces to play a pivotal role in facilitating refugee integration into host countries. The branch characteristics of CA, specifically being culturally attuned "through extensive predeployment study, network engagement, and, when possible, theater engagement," allow CA forces to be "aware of population demographics, cultural nuances, divergent world views, biases, prejudices, and stereotypes that affect both the civil component and military operations."[5] This makes them especially well-suited to bridge the gap between displaced populations and host communities in complex multicultural environments.

Integration issues seen during the Afghan refugee crisis are like those faced in earlier resettlements, such as those experienced by Soviet, Vietnamese, Iraqi, Albanian, and Syrian refugees. Lessons from these past experiences show that civil–military cooperation (CIMIC), interagency cooperation, and clear policy frameworks are crucial for successful integration efforts.

Civil–military integration is not ancillary—it is essential to successful refugee integration and long-term stability.

NATO doctrine reinforces this imperative via Allied Joint Doctrine 3.19, stating "CIMIC is key to effective communication and coordination with the broad spectrum of non-military actors. The goal is establishing networks to create mutual understanding between military and non-military actors to foster cooperation during activities and operations. Ideally, mutual understanding and good working relationships are developed through training, education, and other initiatives before any crisis."[6] Doctrine and

historical outcomes converge on a key insight: Civil–military integration is not ancillary—it is essential to successful refugee integration and long-term stability.

Operation ALLIES WELCOME and Interagency Lessons Learned

OAW revealed notable shortcomings in strategic planning and interagency collaboration. Immediate issues included fragmented responsibilities among the Department of Homeland Security (DHS), the Department of State (DoS), and the Department of Defense (DoD).

"The lack of [memorandums of agreement] between the DoD and the DoS and the DHS resulted in unclear expectations of individual roles and responsibilities. For example, during our site visits, we identified several areas where roles and responsibilities between the DoD, the DoS, and the DHS were unclear, including accountability of Afghan evacuees, law enforcement jurisdiction, and provision of services beyond basic sustainment," reported *The DoD Inspector General Special Report: Lessons Learned from the Audit of DoD Support for the Relocation of Afghan Nationals*[7] in 2022. The absence of clearly defined organizational authorities creates inefficiencies, resulting in delays and suboptimal outcomes for refugees. Notably, the misalignment of agency roles impairs timely access to essential services, such as health care, education, and employment authorization, placing refugees and local communities at risk of frustration and mistrust.

The organizational deficiencies revealed in recent NEO and refugee operations highlight a critical yet underleveraged opportunity: the deliberate integration of CA and MISO elements into preemptive interagency planning structures. MISO, defined in Joint Publication (JP) 3-53*, Joint Military Information Support Operations,* comprises "planned operations to convey selected

information and indicators to foreign audiences to influence their emotions, motives, objective reasoning, and ultimately the behavior of foreign governments, organizations, groups, and individuals in a manner favorable to the originator's objectives."[8] When positioned early in the planning cycle, MISO not only shapes perception and behavior in complex operating environments but also serves as a force multiplier in countering disinformation, stabilizing host communities, and reinforcing the legitimacy of resettlement operations.

> *When positioned early in the planning cycle, military information support operations not only shapes perception and behavior in complex operating environments but also serves as a force multiplier in countering disinformation, stabilizing host communities, and reinforcing the legitimacy of resettlement operations.*

These components provide high value, enabling support, and, more importantly, the ability to establish trust in skill set and capability. Embedded early, SOF enhances operational cohesion, reduces interagency friction, and reinforces legitimacy among domestic partners and displaced populations. *JP 3-0, Joint Campaigns and Operations,* states explicitly that "using SOF independently or integrated with conventional forces, gains an additional and specialized capability to achieve objectives that might not otherwise be possible."[9] This doctrinal guidance affirms that SOF delivers an irreplaceable comparative advantage: the capacity to streamline communication, accelerate resource flow, and mitigate cultural misalignment at institutional and

community levels. A more deliberate framework that leverages SOF's adaptive, culturally attuned posture reinforces unity of effort and measurably improves refugee resettlement outcomes across the competition continuum.

National Security and SOF's Counter-Radicalization Potential

Strategically, refugee integration is fundamentally tied to enhancing resilience against adversarial exploitation. Radicalization often stems from social isolation, economic marginalization, and perceived injustice. Successful integration counters these factors by fostering inclusive communities, stable employment opportunities, and social cohesion.[10] Interagency frameworks facilitating rapid employment authorization and culturally appropriate support systems directly contribute to national security by reducing susceptibility to extremist influences. SOF involvement in these frameworks brings valuable counterterrorism expertise, as operators are adept at identifying the early signs of radicalization and can assist in developing preventive community engagement programs. Notably, the 2024 SORT highlights the evolving nature of terrorism and insurgency, emphasizing that threats can develop within diasporas if integration is poorly managed, reinforcing the critical overlap between domestic security and SOF's counter-radicalization mission.

SOF's embedded CA and MISO capabilities provide a doctrinally sanctioned, field-proven toolkit for addressing cultural mistrust and disinformation in refugee integration. CA teams specialize in navigating cultural complexities, bridging communication gaps, and facilitating trust-building between refugees and host communities.[11] MISO elements can also conduct targeted messaging campaigns to counter misinformation, promote social integration, and mitigate radicalization risks. Leveraging these specialized skills within

> *SOF's embedded civil affairs and military information support operations capabilities provide a doctrinally sanctioned, field-proven toolkit for addressing cultural mistrust and disinformation in refugee integration.*

interagency integration frameworks significantly enhances community strategic resilience and stability. Indeed, prior successes in counterinsurgency and stabilization missions abroad demonstrate that SOF community-based approaches are adaptable to domestic contexts when employed under apparent legal authority and in partnership with civilian agencies. These parallels confirm that the same high-touch, people-centric strategies that drive success in foreign internal defense can produce measurable benefits in refugee resettlement, resonating strongly with the 2024 SORT's human domain focus—"Humans are more important than hardware."[12]

Theory of Planned Behavior in a SOF-Enabled Context

The theory of planned behavior (TPB), developed by social psychologist Icek Ajzen, is a valuable framework for understanding refugee integration dynamics. The TPB posits that individuals' integration behaviors are "shaped by attitude toward the behavior, subjective norms, and perceived behavioral control."[13] Applying the TPB within interagency and SOF-led integration initiatives can enable more precise targeting of resources and communication strategies to address refugee integration barriers and reinforce positive community interactions effectively.

SOF can leverage the TPB by deploying culturally informed messaging in coordination with local organizations to foster supportive attitudes and norms that facilitate smoother resettlement

processes. This is in line with "operationalizing strategic influence and information...in which the term 'strategic influence' is utilized to describe how SOF can project soft power around the globe"[14] from the 2024 SORT.

From a behavioral science approach, TPB enhances the crafting of MISO campaigns that account for how refugees and host communities perceive one another. By systematically identifying social barriers and shaping positive community narratives, SOF practitioners can proactively counter extremist propaganda that capitalizes on social grievances, a key objective of special operations in the modern operational environment. For instance, SOF-led MISO could use the TPB to design campaigns that shift local community attitudes positively toward refugees by addressing misconceptions, emphasizing common values (attitudes), highlighting successful integration narratives, explaining social norms, and providing clear guidance on community roles in integration processes and perceived behavioral control.

SOF as Integrator: Doctrinal Roles in Civil–Military Refugee Operations

Analysis of Afghan refugee integration reveals systemic inefficiencies in visa processing, inadequate housing plans, and insufficient cultural orientation programs. These deficiencies extend beyond the initial resettlement phases, adversely affecting long-term integration outcomes.

The overlapping authorities among the DoS, DoD, and DHS are exactly the pitfall forewarned by JP 3-08, *Interagency Cooperation*, which states, "directly or indirectly, refinement of the military mission should be coordinated with USG departments and agencies, international organizations, [non-government organizations (NGO)], and private sector entities to identify the capabilities to achieve unity of effort."[15]

Doctrinal guidance for preventing such seams already exists. JP 3-29, *Foreign Humanitarian Assistance,* emphasizes "direct, early liaison UN and other humanitarian relief agencies is a valuable source of accurate, timely information on many aspects of the crisis area. USG, UN, NGO, or international organizations' involvement is likely to precede that of U.S. or multinational forces. It presents an opportunity to enhance early force effectiveness significantly."[16] JP 5-0, *Joint Planning* adds that "interorganizational planning and coordination is the interaction among elements of DoD; participating USG departments and agencies; state, territorial, local, and tribal agencies; foreign military forces and government departments and agencies; international organizations; [NGOs]; and the private sector to achieve an objective."[17] Embedding CA elements—alongside MISO planners—within an OAW-type joint planning group would have created a standing liaison bridge to NGOs and municipal agencies, improving coherence from the outset.

Drawing from historical lessons, agencies can adopt evidence-based practices such as early mentorship programs and multilingual outreach to address the distinct needs of diverse refugee populations with precision and legitimacy.

Synthesizing with Special Operations Research Topics 2024 Objectives

The intersection of refugee integration and domestic security is significant. Historical and contemporary case studies consistently illustrate that successful integration reduces radicalization risks, enhances societal cohesion, and fosters national security. Strategic integration frameworks must incorporate comprehensive counter-radicalization strategies including community outreach, mentorship programs, and proactive engagement by trusted community leaders. These strategies align closely with SOF's broader counterterrorism and counter-radicalization missions, highlighting the direct

Historical and contemporary case studies consistently illustrate that successful integration reduces radicalization risks, enhances societal cohesion, and fosters national security.

relevance of refugee integration initiatives to SOF operational objectives. The 2024 SORT specifically identifies the need for innovative interagency models that enhance community resilience against extremist narratives—an area where SOF can serve as a force multiplier given its proven record in conflict prevention and stabilization.

Several policy recommendations have emerged from analyses of Afghan resettlement experiences and comparative case studies to optimize strategic refugee integration. First, enhancing coordination among federal, state, and local authorities is paramount. Clarifying organizational roles and responsibilities, as outlined in allied and joint doctrine, improves efficiency, ensuring the integration initiatives' timely and coherent implementation. Second, strategically using public–private partnerships broadens resource accessibility, diversifies the spectrum of support services, and strengthens localized integration efforts. These partnerships serve as essential channels for coordination and knowledge-sharing, with stakeholders identifying "organizations and networks as a critical factor that enabled them to draw on each other and share information, resources, and training."[18] Third, explicit policy frameworks facilitating expedited employment authorization and comprehensive cultural training programs are essential for empowering refugees to achieve immediate socioeconomic stability.

SOF's active involvement in strategic integration initiatives offers these benefits. SOF units gain deeper insights into cultural dynamics, enhancing their operational effectiveness abroad while

contributing to domestic resilience and security. In alignment with the 2024 SORT, this dual applicability of SOF skills—internationally and domestically—reflects a holistic model of security and stability that addresses threats across the human domain. Establishing dedicated SOF-led task forces for refugee integration offers a scalable mechanism to leverage specialized competencies in cultural intelligence, community engagement, and strategic communication.

JP 3-05, *Joint Doctrine for Special Operations,* emphasizes that such missions "consist of one or more of the following characteristics: political or diplomatic sensitivity; time sensitivity; lower-signature methods; working beside, with, and through indigenous forces; and greater requirements for sociocultural expertise."[19] Embedding these capabilities within broader federal integration frameworks enables the USG to meet displaced populations' complex, context-specific needs more effectively while maintaining a forward-leaning posture toward emergent security threats.

Monitoring, Evaluation, and Future Implications

Despite these clear advantages, integrating SOF into refugee resettlements may face hurdles, such as perceptions of militarizing humanitarian processes. The delineation of roles and civilian oversight mechanisms should be embedded within the interagency frameworks to mitigate this issue. Monitoring and continuous evaluation are critical components of successful integration strategies. Effective evaluation frameworks should also incorporate key metrics, such as employment rates, educational attainment, social integration indices, and security indicators. Regular assessments facilitate adaptive policy adjustments and resource reallocation, ensuring sustained integration success. Robust data collection and analysis practices must underpin these monitoring efforts to ensure accuracy, transparency, and accountability.

> *Lessons from Afghan resettlement must inform proactive preparations for future crises. Strategic integration frameworks developed now will enhance national capabilities to respond effectively and humanely to future mass displacement scenarios.*

Additionally, interagency data-sharing agreements—supported by secure information systems—enable stakeholders to access real-time updates on integration progress, thus minimizing duplication of efforts and resource waste. SOF's intelligence-gathering and assessment expertise—often employed in foreign operations—can be adapted to support domestic evaluation mechanisms, embodying the 2024 SORT directive to innovate across mission domains. Finally, the broader implications of strategic refugee integration extend to emerging challenges, such as climate-driven migration and geopolitical instability. Lessons from Afghan resettlement must inform proactive preparations for future crises. Strategic integration frameworks developed now will enhance national capabilities to respond effectively and humanely to future mass displacement scenarios. Efforts to strengthen domestic societal resilience and reinforce U.S. leadership abroad must be accompanied by deliberate information activities, ensuring that "information activities are conducted in a manner that reinforces the credibility and legitimacy of DoD and USG activities."[20]

From the SOF perspective, constructing a forward-leaning integration framework directly supports the 2024 SORT's call to prepare for gray zone contingencies and complex humanitarian crises—scenarios that increasingly blur the line between conflict and stability and that pose tangible risks to U.S. strategic interests. "The gray zone is a realm of international relations between peaceful interstate diplomacy, economic activity, and people-to-people

contact on one end of the spectrum and armed conflict on the other, and gray zone activities as coercive or subversive actions to achieve objectives at the expense of others in contravention or the absence of international norms."[21] In the context of NEOs and the complex requirements of post-evacuation refugee integration, this is not a peripheral concern but a frontline matter of strategic consequence. For SOF, whose missions often unfold in the ambiguous space between crisis response and long-term stabilization, refugee integration demands anticipatory planning, synchronized interagency coordination, and sustained investment.

Conclusion

The 2021 Afghan NEO and subsequent OAW exposed enduring vulnerabilities in the U.S. ability to manage mass displacement, particularly in the face of gray zone threats and strategic instability. Research has demonstrated that refugee integration is not solely a humanitarian obligation but a matter of national security, resilience, and strategic influence. The fragmented interagency response to Afghan resettlement and the underutilization of SOF capabilities underscores a missed opportunity to apply doctrinally sound, culturally informed strategies that may have mitigated risk and enhanced operational coherence.

SOF, with its embedded CA and MISO units, brings more than tactical expertise. It offers a scalable framework for trust-building, counter-radicalization, and strategic communication in volatile environments. Its population-centric skillsets, honed in counterinsurgency and foreign internal defense, are directly transferable to domestic integration contexts when applied under appropriate legal authorities and civilian oversight. As the 2024 SORT clarifies, the human domain remains decisive in future conflicts, and integrating displaced populations is a frontline effort.

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Preserving Knowledge, Enhancing Readiness: An Education Framework for Special Operations Government Civilians

By Jaime "Jay" Macias, EdD

Members of the U.S. Special Operations Command (USSOCOM) Civilian Leader Development Program visiting Marine Forces Special Operations Command on Camp Lejeune, North Carolina, March 5, 2024. The visit gives joint and USSOCOM civilian leaders the opportunity to further familiarize themselves with the special operations forces that they support. (U.S. Marine Corps photo by Corporal Henry Rodriguez)

What if U.S. Special Operations Command lost the decades of knowledge built through experience?

Special Operations Forces (SOF) cannot be mass produced (SOF Truth III). It takes years to train operational units to the level of proficiency needed to accomplish difficult and specialized SOF missions. Intense training—both in SOF schools and units—is required to integrate competent individuals into fully capable units. This process cannot be hastened without degrading ultimate capability.[1]
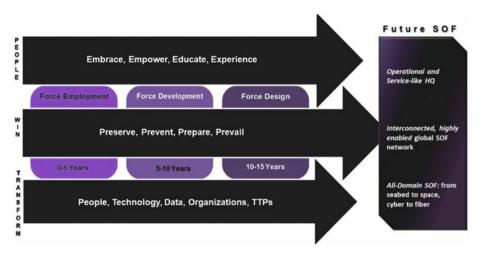
Introduction

At the core of special operations is a network of highly skilled civilians whose expertise and institutional knowledge are essential to USSOCOM's ability to anticipate mission needs and allocate resources effectively to execute its "service-like" and combatant command (COCOM) responsibilities.

The *USSOCOM Strategic Enterprise Plan* (SEP) recognizes and addresses the inherent tension between USSOCOM's legislative "service" responsibilities (Title 10, Section 167) and its duties as a COCOM (Title 10, Section 164).[2] Over the last two decades, to fulfill its obligations under Section 164 that highlight the need to support COCOM Global War on Terror (GWOT) objectives, USSOCOM prioritized force employment to respond to real-world operations in Iraq and Afghanistan. As a result, responsibilities related to force development and force design—Section 167—took a secondary role.

The SEP aims to rectify this imbalance through the PEOPLE, WIN, AND TRANSFORM framework to ensure USSOCOM's "ability to effectively organize, train, equip, and provide forces required to achieve national priorities now and in the future."[3] The *USSOCOM Human Capital Strategy* is the foundation for the SEP's PEOPLE line of effort, driving efforts to enhance the enterprise. Built on four key pillars—EMBRACE, EMPOWER, EDUCATE, and EXPERIENCE—the strategy is designed to cultivate a highly capable and resilient force.[4] See Figure 1.

To preserve knowledge and enhance readiness, what's needed is a special operations-peculiar (SO-P) government civilian education program that answers the question: How can SOF improve the execution of its service-like responsibilities (e.g., program, planning, budget, and execution [PPBE]; cost assessment and program evaluation [CAPE]; and doctrine, organization, training, materiel, leadership, personnel, facilities, policy [DOTMLPF-P]) utilizing the SORT focus area of SOF education?

Figure 1. U.S. Special Operations Command Strategic Enterprise Plan. Source: *SOF Renaissance booklet*

The issues and recommendations mentioned apply to government civilians across the special operations enterprise. However, a case study to evaluate the effectiveness of USSOCOM's civilian education opportunities at Headquarters (HQ) USSOCOM and the Joint Special Operations University (JSOU) Enlisted Academy Career Education Program will identify areas for improvement in educating and preparing Department of the Air Force civilians at HQ USSOCOM that can be applied across the SOF enterprise.

Background

Unlike the uniform composition of military services, USSOCOM consists of personnel from various military branches. This includes the U.S. Army Special Operations Command (USASOC), the Naval Special Warfare Command (NSW), the Air Force Special Operations Command (AFSOC), and the Marine Forces Special Operations Command (MARSOC).[5] USSOCOM government civilians primarily occupy assignments at the special operations joint and service component level. Government civilian employees who support

USSOCOM come from different branches of the Department of Defense (DoD) depending on the military base's executive agent and hiring authority.

For instance, government civilians at HQ USSOCOM and AFSOC are classified as Department of the Air Force civilians. Those working within USASOC are identified as Department of the Army civilians, and civilians at NSW and MARSOC are affiliated with the Department of the Navy. These SOF professionals play critical roles, from action officers to senior executives. Despite their increasing presence and importance, only a small fraction of these government civilians receive specialized education tailored to the unique demands of SOF operations and activities.

A lack of education about specific SOF challenges and evolving threats could lead to strategic blind spots in force employment, development, and design—hindering rapid adaptation to new threats. These civilians serve as the repository of knowledge and overseers of the processes crucial for executing USSOCOM's legislative responsibilities as a "service."

To ensure the successful execution of USSOCOM's unique missions, government civilians must lead and manage SO-P critical roles that require deep institutional expertise for knowledge creation and knowledge transfer. For instance, Special Operations Financial Management (SOFM), Acquisition, Technology, and Logistics (AT&L), and JSOU are all overseen by government senior executives. Additionally, many personnel in these roles are not uniformed special operations members.

Discussion: What Winning Needs

The *SOF Renaissance* booklet, published by HQ USSOCOM in February 2025, presents a comprehensive vision for special operations, drawing on eight decades of experience from the Office

of Strategic Services to present.[6] While it serves as a nostalgic reflection on the past, the *SOF Renaissance booklet* also outlines the essential requirements for special operations to address future challenges and achieve success, or "What Winning Needs," a term used by USSOCOM to describe resourcing actions SOF require to win in future conflicts. The dynamic nature of special operations necessitates government civilians who possess SO-P education to swiftly analyze intricate situations, devise innovative solutions, and make decisions while maintaining a delicate balance between force execution (support to Title 10, Section 164) and development and design (support to Title 10, Section 167).

USSOCOM Civilian Professional Development

USSOCOM employs a three-tiered approach to professional development for its civilian personnel. The USSOCOM J1 (Personnel) Civilian Branch (J1-C) offers various opportunities tailored to civilian grades. First, J1-C coordinates individual leadership opportunities for government civilians to participate in professional development programs that enhance their leadership skills. These include courses offered by Harvard's John F. Kennedy School of Government, the University of Virginia, Eckerd College, the Office of Personnel Management (OPM), and others. Second, J1-C offers the Civilian Leadership Development Program (CLDP), a nine-month initiative designed to familiarize USSOCOM government civilian employees with the functions and components of the SOF enterprise. Third,

J1-C seeks to provide opportunities for USSOCOM government civilians (GS-12 to GS-15) to attend professional military education (PME) via Command and Staff Civilian programs at the U.S. Naval War College and Marine Corps University.[7] See Table 1.

▌ **Table 1.** USSOCOM Fiscal Year 2025 Civilian Education Programs

Programs	Duration	Eligibility
Individual Leadership Opportunities		
Program: The Leadership Challenge Provider: Graduate School USA	2.5 days	GS 11-13
Program: Gettysburg Leadership Experience – Signature Leadership Experience Provider: FCC Services	3 days	GS 11-13
Program: Gettysburg Leadership Experience - Pursuit, Retreat, & Resilience Provider: FCC Services	3 days	GS 13-14
Program: Leadership Development Program Provider: Center for Creative Leadership, Eckerd College, St Petersburg	5 days	GS 12-14
Program: Leading Change Provider: Office of Personnel Management	5 days	GS 14-15
Program: Leadership Decision Making – Optimizing Organizational Performance Provider: JFK School of Government, Harvard University	5 days	GS-15
Civilian Leadership Development		
Program: Civilian Leadership Development Program (CLDP) Provider: J-1 Civilian Personnel Department	9 Months	GS 12-14
Professional Military Educational		
Program: Marine Corps Command and Staff College Civilian Student Provider: J-1 Civilian Personnel Department	10-11 Months	GS 12-13
Program: Marine Corps War College Civilian Student Provider: J-1 Civilian Personnel Department	10-11 Months	GS 14-15
Program: College of Naval Command and Staff Civilian Student Provider: J-1 Civilian Personnel Department	10-11 Months	GS 13-14
Program: Naval War College Civilian Student Provider: J-1 Civilian Personnel Department	10-11 Months	GS 14-15

▌ Source: Author

Department of the Air Force Civilian Professional Development

The Department of the Air Force provides academic and leadership programs to equip Department of the Air Force Civilians (DAFC). These programs encompass PME attendance at intermediate developmental educational institutions such as Air Command & Staff College, which cater to GS-12 to GS-13 personnel. Furthermore, senior developmental education is offered at institutions like the Air University's Air War College, designed for GS-14 and GS-15 individuals. In addition, the Air Force provides leadership seminars and short courses tailored to DAFC members, including the Civilian Leaders Course for GS-14 to GS-15 and the

Defense Civilian Emerging Leader Program, which focuses on GS-7 to GS-12.[8] See Table 2.

Table 2. Department of the Air Force Civilian Professional Development Categories

CD Portfolio by Category

Professional Military Education (PME)

Basic Developmental Education (BDE)	Eligible Grades	Pri	Alt
Squadron Officer School (SOS)	GS 9-12	100	20
Intermediate Developmental Education (IDE)	Eligible Grades	Pri	Alt
Air Command & Staff College (ACSC)	GS 12-13		
ACSC + School of Advanced Air and Space Studies (ACSC+SAASS)	GS-13	14	7
Air Command & Staff College On-Line Master's Program (ACSC-OLMP)	GS 12-14	210	10
Intermediate Level Education -Schriever Space Scholars (ILE-SSS)	GS 12-13	2	1
School of Advanced Nuclear Deterrence Studies (SANDS)	GS 12-13	1	1
Senior Developmental Education (SDE)	Eligible Grades	Pri	Alt
Air War College (AWC)	GS 14-15	11	6
College of Information and Cyberspace Program (CIC)	GS 14-15	2	1
Defense Senior Leader Development Program (DSLDP)	GS 14-15	9	3
The Dwight D. Eisenhower School for National Security & Resource Strategy (ES)	GS 14-15	2	3
The Dwight D. Eisenhower School for National Security & Resource Strategy-Sr Aq Course (ES-SAC)	GS 14-15	7	7
National War College (NWC)	GS14-15	1	1
Senior Level Education - West Space Scholars (SLE-WSS)	GS 14-15	1	2

Academic

Academic	Eligible Grades	Pri	Alt
Air Force Institute of Technology (AFIT)	GS 12-15		
Bachelor's Degree	GS 7-15 (GS & FWS)	8	3
Master's Degree	GS 12-15 (GS & FWS)		
Strategic Thinkers Program (STP)	GS 13-15	2	1

Fellowships

Fellowships	Eligible Grades	Pri	Alt
Air Force National Laboratories Technical Fellowship Program (AF-NLTFP)	GS 12-15	2	2
DAF Legislative Fellows Program (LEGIS)	GS 12-14	4	4
RAND Research Fellowship Program (RAND)	GS 14-15	1	1

Experiential Assignment / Program

Experiential Assignment / Program	Eligible Grades	Pri	Alt
Civilian Short-Term Experiential Program (CSTEP)	GS 11-14	10	2
Civilian Strategic Leader Program (CSLP)	GS 13-15	N/A	N/A
Director's Development Program in Leadership (DDPL)	GS14-15	1	1
Education With Industry (EWI)	GS 11-13	20	10
Excellence in Government (EIG)	GS 14-15	15	5
Executive Leadership Development Program (ELDP)	GS 12-13	10	5
President's Management Council - Interagency Rotation Program (PMC-IRP)	GS-13	6	6
White House Leadership Development Program (WHLDP)	GS 15	1	1

Leadership Seminars / Short Courses

Leadership Seminars / Short Courses	Eligible Grades	Pri	Alt
Civilian Leader Course (CLC)	GS 14-15	120	30
Defense Civilian Emerging Leader Program (DCELP)	GS 7-12	59	8
Enterprise Leadership Seminar (ELS)			
Enterprise Perspective Seminar (EPS)			
Leading Strategically (LS)	GS 15	44	36
National and International Security Leadership Seminar (NISLS)			
Developing Supervisor Course (DSC)	GS 11 (GS & FWS)	400	100
Leading Change and Innovation (LCI)	GS 15	39	20
Leading Department of the Air Force (DAF) Organizations (LDO)	GS 14-15	210	30
The Supervisor as Leader (TSL)	GS 12-13	180	30
Upgrading Your Executive Leadership Approach (UEL)	GS 15	39	20

Enterprise Programs

Functional Plus Programs

Note: All eligible grades include equivalents

Source: Air Force Personnel Center

USSOCOM Civilian Education Continuum

While USSOCOM and the Air Force offer commendable civilian development initiatives, they fall short of meeting the distinct educational requirements of HQ USSOCOM government civilians. A tailored education program is needed to prepare civilians to effectively execute the SOF responsibilities outlined in Title 10, Sections 167 and 164.

Furthermore, these bifurcated efforts lack a SO-P comprehensive learning pathway and professional education continuum incorporating andragogical principles. An education program focused on enhancing the cognitive abilities of government civilians across diverse professional roles and grades is not just beneficial—it is vital for effective special operations and activities. A USSOCOM

> *History doesn't always repeat itself, but it often rhymes. – Mark Twain*

civilian education continuum will empower government civilians with the knowledge and abilities to synthesize vast amounts of information, foresee potential challenges, and formulate comprehensive recommendations that resonate with mission objectives. By investing in such a program, USSOCOM will ensure that its civilian workforce is equipped to meet the evolving demands of special operations with confidence and agility.

Psychological discomfort stemming from the unknown, such as status quo bias, will likely lead to questions regarding the need for a USSOCOM civilian education program:

- Why can't the military services educate government civilians?

- Is this not merely replicating what the services already provide?

SOF Enlisted Education

Similarly, these concerns were echoed by those questioning whether USSOCOM should be involved in educating special operations enlisted personnel. In August 2007, USSOCOM Command Senior Enlisted Leader Command Sergeant Major Thomas Smith identified a gap in special operations enlisted education. Smith initiated an assessment of the effectiveness of SOF senior enlisted leaders operating within a joint and interagency environment, which identified knowledge gaps. In 2009, USSOCOM launched a pilot course for the Joint Special Operations Forces Senior Enlisted

Academy (JSOFSEA). Then, in 2011, USSOCOM began a study to validate the current and future education requirements of the SOF enlisted force. The study concluded that "traditional service enlisted [PME] courses were not adequately equipping SOF NCOs with the knowledge, skills, and abilities (KSA) necessary to maximize their effectiveness and independently plan, operate, and lead in complex joint, interagency, intergovernmental, and multinational (JIIM) operating environments."[9] This finding led to the establishment of JSOU's Enlisted Career Education Program (CEP) 1–4. See Figure 2.

In 2023, the Joint Staff held the Enlisted Military Education Review Council at JSOU, where senior enlisted advisor to the chairman, Sergeant Major Troy Black shared his experiences as a graduate of JSOFSEA. "JSOFSEA provided my career's most comprehensive joint PME experience," he said. "It equipped me with the essential tools to become operationally proficient and to understand jointness as a [senior enlisted leader]."[10]

The path to recognizing JSOU's Enlisted Academy was not devoid of challenges. While individuals may retrospectively attribute its success to their foresight, it is crucial to acknowledge

	Operational		Strategic	
Focus Areas	CEP-1 Joint Fundamentals 8 Weeks (DL) E6	CEP-2 Enterprise Management 8 Weeks (DL) E7	CEP-3 JSOFSEA 24 Weeks (DL) 7 (RL) E8/E9	CEP-4 Summit 8 Week (DL) 3 Week (RL) CSEL
Foundational Principles	USSOCOM Enterprise	Change Management	Profession of Arms	U.S. National Policy & Strategy
Joint SOF Leadership Development	Communication Skills	Organizational Leadership	Leadership Across JIIM+C	Strategic Leadership & The USSOCOM Enterprise
Ethics, Foresight, and Application	Foundational Ethical Decision Making	Operational Application of Strategic Theory	Policy to Action	Global Security & National Power
Decision-Making Competency	Creative Thinking	Critical Thinking	Joint Warfighting	Strategic Thinking & USSOCOM Force Management

Figure 2. Joint Special Operations University Enlisted Career Education Program areas of focus. Source: Joint Special Operations University, 101 Brief

the unwavering efforts of leaders who championed establishing a dedicated program to educate the special operations enlisted force. Kenneth E. Wolf, the JSOU Enlisted Academy strategic analyst when JSOFSEA and CEP were established, noted that the success of the endeavor hinged on the persuasion of service chiefs and their senior enlisted leaders. For instance, on December 29, 2010, General Martin E. Dempsey, the commanding general of Headquarters, United States Army Training and Doctrine Command, sent a memorandum to Vice Chief of Staff of the Army General Peter W. Chiarelli, acknowledging the uniqueness and benefit of JSOFSEA but refraining from granting it equivalency with the Army's Sergeants Major Course.[11] The Army's denial of PME equivalency necessitated the attendance of both courses by Army special operations senior enlisted personnel to ensure PME completion along with SOF-peculiar education offerings appropriate for career progression.

Only the most senior members of USSOCOM could address the services' concerns that JSOFSEA was not a replacement but rather an augmentation of ongoing efforts to address gaps in enlisted special operations PME. Admiral William H. McRaven (ninth USSOCOM commander) personally petitioned at his level to address the need for SO-P education. On March 12, 2012, McRaven wrote in his posture statement to the 112th Congress Senate Armed Services Committee that:

> USSOCOM is forging a comprehensive leadership development program designed to train, educate, and manage the career paths of future SOF leaders. We will develop tailored SOF professional military education to provide the tools required for today's complex environment, and we will work with the Services to more effectively manage the career progression of SOF leaders, including key combined, joint, and interagency assignments.[12]

All the services granted full equivalency to the JSOU Enlisted Academy in 2019, and it is now recognized in the Chairman of the Joint Chiefs of Staff Instruction (CJCSI 1805.01C) for Enlisted Professional Education Policy.

Recommendations

To answer this question, a SO-P Government Civilian Career Education Program (GC-CEP), based on the proven JSOU Enlisted Academy CEP model, is proposed. The GC-CEP aims to develop a group of cross-service DoD special operations civilian leaders who have a deep understanding of the unique requirements of the SOF enterprise. By investing in civilian expertise, USSOCOM can strengthen its ability to fulfill its legislative responsibilities, adapt to evolving threats, and sustain operational readiness in an era of force and resource reductions.

With force restructuring and force design underway, how should a SO-P government civilian education program be designed to ensure knowledge continuity, expertise, and the ability to outthink future threats?

Recommendation 1

Designate JSOU as the special operations GC-CEP lead. This move will streamline oversight, facilitate knowledge transfer, enhance efficiency and cost savings, and promote standardization. JSOU's certification under the Accrediting Council for Continuing Education & Training (ACCET) significantly increases the chances that the services will equate the GC-CEP with comparable civilian professional development continuums.

> *By investing in civilian expertise, USSOCOM can strengthen its ability to fulfill its legislative responsibilities, adapt to evolving threats, and sustain operational readiness in an era of force and resource reductions.*

1.A. Transition all HQ USSOCOM civilian professional development activities, personnel, and resources to JSOU. This action will enable a comprehensive and centralized approach to preparing the civilian workforce for the unique demands of working at HQ USSOCOM, executing staff work related to legislative "service" responsibilities (Title 10, Section 167) and its duties as a COCOM (Title 10, Section 164).

1.B. Under JSOU's responsibility to provide educational governance for the SOF enterprise, JSOU will collaborate with USSOCOM service components and service civilian departments to develop a complementary and equivalency education framework for special operations government civilians.

1.C. JSOU will take on the role of a professional development (PRODEV) sponsor, aiming to secure additional training and education funds (Budget Activity 03) from HQ USSOCOM to support the PRODEV of the special operations government civilian workforce.

Recommendation 2

Develop a SO-P Government Civilian Education Continuum Program. Through a structured education continuum, this program will ensure that government civilians involved in special operations are well-equipped to oversee and support special operations

missions effectively. The program will be open to all class positions and General Schedule (GS) levels from GS-9 to GS-15. The program will emphasize maintaining institutional knowledge, fostering interagency collaboration, and enhancing strategic decision-making. All levels will include grade-appropriate modules such as SO-P government operations (e.g., Major Force Program [MFP] 11, non-service common acquisition, and SO-P authorities), fundamentals of leadership, and technical proficiency subjects of interest (e.g., data literacy, and effective communications).

2.A. Establish a foundational course (GC-CEP 1) to equip special operations government civilians with the essential knowledge of the SOF enterprise, SOF missions, MFP-11, SO-P staff activities, and the dual "service" and COCOM roles. This course will serve as the SO-P education for GS-9 to GS-11 at the action officer level. GC-CEP 1 will be conducted entirely online, utilizing both synchronous and asynchronous formats.

2.B. Redesignate the USSOCOM CLDP as GC-CEP 2 (Special Operations Enterprise Management). The focus of the GC-CEP 2 course will be to build managerial and leadership capabilities while deepening expertise and fostering cross-functional collaboration in executing Section 167 and 164 "service" and COCOM responsibilities. GC-CEP 2 will be designated as special operations education for GS-12 to GS-13 at the program manager or branch chief level. GC-CEP 2 will be conducted in both online (synchronous and asynchronous) and in-person formats.

2.C. Establish an executive leadership course (GC-CEP 3) to prepare participants for executive leadership roles, focusing on strategic thinking, special operations organizational leadership, and policy formulation. GC-CEP 3 will be designated as special operations education for GS-14 to GS-15 at the department chief or deputy director level. GC-CEP 3 will be conducted in both online (synchronous & asynchronous) and in-person formats. See Table 3.

Table 3. Government Civilian Career Education Program (GC-CEP) Framework

Special Operations (SO) Civilian Population	Desired Outcome	Focus Areas (SO-Peculiar)
SO Fundamentals (GC-CEP1) GS 9-11 24 Weeks Distance Learning (DL)	**Equip** participants with foundational knowledge of SO operations, MFP-11, and dual "Service and Combatant Command responsibilities.	• Special Operations (SO) Government Operations* • Synchronizing SOF capabilities with Service and Geographic Combatant Commands (GCCs)* • Programming and defending MFP-11 resources • Developing, procuring, and sustaining SOF-peculiar equipment • Fundamental leadership (communication, time management, stress management) [*Applicable to All GC-CEP Levels]
SO Enterprise Management (GC-CEP2) GS 12-13 36 Weeks DL and In-Person	**Build** SO managerial and leadership capabilities while deepening technical expertise and fostering cross-functional collaboration.	• SO Policy Understanding and Implementation • How SOF Runs/Project Management • Mentorship and Peer Networking • Enterprise Leadership (Delegation, Decision-Making, Emotional Intelligence)
SO Executive Leadership (GC-CEP3) GS 14-15 12 Weeks DL and In-Person	**Prepare** participants for SO executive leadership roles, focusing on strategic thinking, organizational leadership, and policy formulation.	• SO Policy Development and Implications • Strategic Leadership (ECQs) • Executive Decision-Making and Risk Management

Source: Author

Conclusion

The effectiveness of USSOCOM relies on its highly trained The effectiveness of USSOCOM relies on its highly trained military personnel and a knowledgeable, adaptable, and well-educated civilian workforce. As force restructuring reshapes the operational landscape, the role of USSOCOM government civilians in preserving institutional knowledge, managing SO-P critical programs, and ensuring mission continuity has become increasingly vital. However, USSOCOM government civilians lack a formalized education continuum specific to special operations, which is necessary to prepare them for the complex, joint, and non-service-specific environment in which they operate.

To fill this gap, a SO-P GC-CEP, modeled after the JSOU Enlisted Academy CEP, is proposed. By designating JSOU as the lead institution for special operations civilian professional development, USSOCOM can streamline educational efforts, enhance knowledge

retention, and cultivate a group of cross-service civilian leaders who understand and can fulfill the unique legislative responsibilities outlined in Title 10, Sections 167 and 164. A structured GC-CEP continuum, ranging from foundational special operations education to executive leadership training, would equip civilians across the SOF enterprise with the critical thinking, strategic planning, and specialized skills necessary to effectively navigate and sustain SOF operations in an era of evolving threats while also meeting career advancement requirements. By investing in this program, USSOCOM can ensure its civilian workforce remains a powerful asset in supporting national security objectives and maintain SOF's competitive edge in an unpredictable global environment.

The question is no longer whether USSOCOM should establish a civilian education program but rather how quickly it can formally implement one before critical expertise is lost.

About the Author

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The Call for a Special Operations Writing Renaissance: An Instructor's Perspective

Joseph A. Pastorek, MSSL

Introduction

Professional military writing was a staple across the service branches for decades. *Military Times*, *Special Warfare Journal*, *Military Review*, *The NCO Journal*, and numerous similar publications gave service members a voice. This writing promoted idea-sharing, illuminated concerns, presented theses, and gave leaders an invaluable perspective from the force. Whether technology, generational differences, or a prolonged loss of interest or exposure to those publications are to blame, professional military writing deep in the force has waned over the past two decades.

In his *Statement to the House Armed Services Committee*, Commander of the U.S. Special Operations Command (USSOCOM) General Bryan P. Fenton, stated:

> Your [Special Operations Forces] SOF stand ready to meet the complex challenges of this decisive decade with specially assessed and selected personnel, enabled by cutting-edge capabilities and training. Decades of problem-solving, courage, and relentless determination, attest to SOF's ability to prepare the global operating environment, contributing to integrated deterrence.[1]

From a SOF instructor perspective, Fenton's statement highlights the need to enhance the ability of SOF professionals to revitalize leadership principles and trust, think critically, solve problems, and innovate to win in the new age of SOF. Using the contents of the *2024 Special Operations Research Topics* booklet for base topics, does current SOF education and training adequately prepare the force for the future?[2]

Within the Enlisted Academy at the Joint Special Operations University (JSOU), career education programs (CEPs) such as the Joint SOF Senior Enlisted Academy (JSOFSEA) graduate hundreds of senior enlisted leaders across joint SOF and international and interagency partners, each year. Witnessing the individual level of intellect and experience growth with each passing class proves that

> *The resurgence of professional military writing is key to strengthening leadership and trust in the U.S. Special Operations enterprise and to educate and evolve a new generation of effective, thoughtful SOF professionals capable of winning in the new era of SOF.*

unmatched potential in the enlisted force, in many cases, lies in an untapped reserve. A considerable population of hyperintelligent, critically thinking enlisted leaders within SOF possess the character, curiosity, and innovative mindset necessary to aggressively attack complex problems and prepare SOF for all aspects of the future operating environment. The resurgence of professional military writing is key to strengthening leadership and trust in the U.S. Special Operations enterprise and to educating and evolving a new generation of effective, thoughtful SOF professionals.

The Current Environment

The history and benefits of professional military writing is well known, and access to publications is well-documented; the concept is not groundbreaking in its novelty. In a 2023 article written for the *Modern War Institute at West Point*, Army Special Forces Lieutenant Colonel Zachary Griffiths writes:

> Branch magazines are in decline, publishing fewer pages, less often, and to smaller audiences. But it doesn't have to be this way. By either reforming the Army's professional journals into modern multiplatform outlets powered by constantly renewing volunteers, or merging with an existing modern platform, branch magazines can again engage their specialist audiences, drive debate about emerging concepts and doctrine, and ready the Army for the next war.[3]

Griffiths and others, with support from the Army Chief of Staff and Sergeant Major of the Army, are well into phase II of their

campaign with the successful establishment of the Harding Project, the Line of Departure military article platform, and the resuscitation of the *Special Warfare Journal* providing viable outlets for the force to achieve the goals set forth by these initiatives.

There has never existed a higher premium on education and innovation than in this current operating environment; its complexities only continue to grow faster than the speed at which any training or curriculum revision can take place. So, what can supplement and enhance the high level of education current SOF professionals already experience?

The four CEP levels at the JSOU Enlisted Academy focus on enlisted leaders at every level and use research and formal writing to enhance learning, drive self-reflection, and encourage the research and review process. JSOFSEA instructors witness this leader enhancement weekly and have done so for 60 classes. Formal, professional military writing is a staple of the JSOFSEA course curriculum, and, along with reflection, is a key component to synthesizing doctrine and course content with experience, ideas, and peer review.

While some enjoy writing, many service members' initial reactions to writing are less positive. However, JSOFSEA students universally experience a significant change in their leadership philosophy and approach through the writing process. Graduates learn to look critically at problems through an ethical, empathetic, and nuanced lens and are equipped to self-reflect and challenge their biases and ideas.

It is possible to replicate the microcosm of leadership evolution witnessed in JSOFSEA in leaders across the special operations enterprise to address gaps in critical areas, provide an outlet and voice to the force, and even outpace the long doctrinal change process. While writing and its benefits are not confined to the enlisted ranks, the significance of noncommissioned officer (NCO)

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writing cannot be overstated. The desired state of SOF professional writing is an environment where leaders at all levels promote and use military writing to share ideas, discuss concerns, innovate through research and frameworks, and reinforce a more effective, ever-improving U.S. SOF that competes and wins across all domains.

The Problem Defined

All majors change in approach to leadership require an examination of challenges and opportunities. When it comes to military writing, a review of opportunities to leverage in that endeavor, the challenges are relatively few— and easy to overcome. Opportunities during recent years have been numerous and not organizationally demanding.

Challenges to Overcome

Getting people involved in writing does present potential challenges. Leaders embrace the idea that professional military writing is a critical skill with many benefits, allowing self-improvement and development to flourish in the face of every other priority. Many enlisted leaders are wary of the writing involved after starting CEPs at JSOU. Still, few deny improvement and the value of the writing process once completed and the tangible benefits are apparent.

The improvement of effective writing has innumerable other positives for leaders. Effective writing is a critical and often-overlooked aspect of leadership. Executing honest and effective evaluations and counseling; developing and presenting courses of action, action group briefings, and white papers; and effectively drafting memorandums and online and written strategic communication are great examples of how writing enhances leader development. Organizational support of writing programs can improve unit pride, cohesion, and trust while leaders at every level refine skills and hone leadership effectiveness.

> *Organizational support of writing programs can improve unit pride, cohesion, and trust while leaders at every level refine skills and hone leadership effectiveness.*

People are more willing to engage in the writing process if they know those efforts will not be ignored. Trust in leadership is imperative to sparking a writing renaissance in the military. Recognition of work is also paramount in persuading people to pick up the pen. Initiatives like the Secretary of the Army Awards for Improving Publications and Publishing Processes program recognize the importance of this principle, rewarding those who do the work to improve their unit, branch, service, and country.[4] The easily printed words outlining the importance of these programs pale in comparison to the actions of deliberately recognizing and highlighting products that affect change.

Once convinced that professional military writing matters to leaders, people will run toward the tools to voice their opinions and ideas.

Knowing how and where to start the writing process, and the motivation to do so, can deter the crowdsourcing of innovation and ideas from the ground level. How often do people sit around a company, team room, motor pool, or arms room lamenting how something could be much better or how inefficient a process or piece of equipment is, and unknowingly stumble into a viable solution? The SOF enterprise overflows with personnel who simply make it happen in the interest of mission accomplishment in any environment or situation. In this regard, every environment, every problem, every day, U.S. SOF is truly *sine pari*, or without equal. The writing process can be as, if not more, effective than any methodology at analyzing, assessing, and solving simple-to-complex problems.

Opportunities to Leverage

Professional military writing provides a direct line from the force and leadership to commanders and decision-makers. It also improves individual leaders and units. A common complaint heard throughout the lower levels of every service branch is that leadership is out of touch, makes decisions or implements changes without input from the majority of the organization, or directs the institution on policies and programs that do not make sense.

What better way to check the pulse of an organization when considering organizational change or evaluating policy effects than by promoting writing? It provides leaders with a phenomenal resource for evaluation cycles or organizational culture assessments without the added stress on time and resources by hold town hall-style sensing sessions, which could be risky and lead to unhealthy organizational climates. Promoting professional writing from the team up to the service level will establish and cultivate trust, motivate individuals to improve their organization (and beyond), and empower the entire special operations enterprise to improve and thrive from within.

Those in the special operations enterprise are working to give a powerful voice to all by establishing programs that promote and stimulate the SOF writing community. The Harding Project, for instance, provides resources, representatives, and a forum to help with the writing and submission process. Staff also review submissions and provide crucial feedback and mentorship. In a 2024 article recognizing an *NCO Journal* editor's award from the Secretary of the Army for outstanding performance, Griffiths writes,

> The USASOC History Office's shift to a web-first approach drastically reduced production timelines, improving publishing speeds by 30%. Reducing the emphasis on print cut costly expenses and streamlined and expedited workflows...And readers followed the shift to web-first content...The focus on digital channels extended the reach of USASOC history across the globe, increasing the number of readers and viewers beyond what was possible with print alone.[5]

Online web submissions available via the Harding Project and forums include the Line of Departure. Its mission is to provide a "centralized hub for accessing the Army's branch journals in a modern, accessible, and user-friendly format" and "provide readers with a singular access point to engage with the wealth of knowledge and insights published across all Army branch journals at any time."[6]

Web and phone applications and other technologies exist for authors to propose new ideas, submit theses, ask questions, and present problems from the force at every level, connecting authors and collaborators for review and brainstorming to tackle relevant issues. These platforms and software are valuable tools in proposed writing programs and initiatives.

At JSOU, JSOFSEA leadership in 2024 established the JSOFSEA Achievement Award for Academic Research and Writing, presented to the student whose paper provides significant contribution to the advancement of USSOCOM-directed research.[7] Summative or capstone papers in JSOFSEA follow an environment-problem-approach structure using a topic selected by each student from

the current SORT booklet. This paper gives JSOFSEA senior enlisted leaders a voice and ownership in areas determined to be important to USSOCOM.

Considering these challenges and opportunities, how does USSOCOM invest in and promote professional military writing as an effective tool to supplement training and education, improve trust and leadership, and build on the evolution of a curious, innovative, and ethically minded U.S. SOF that continues to compete and win in the future?

By answering this question and implementing the following lines of effort (LOE), USSOCOM can achieve the goals outlined in the commander's vision of a future force dedicated to winning through education, improvement, and leader development.

The Approach to Spark a Renaissance

To achieve a SOF writing renaissance, the approach must be feasible and use the identified challenges and opportunities. Further, USSOCOM must establish incentives and improve programs to promote, collaborate, receive, review, and submit professional military writing and papers from the force. This will result in shared innovative ideas and proposals in the interest of improving the special operations enterprise as a profession of arms while maintaining the edge into the future.

Three LOE effectively encompass the many programs, initiatives, and actions to create a culture that values, promotes, and participates in the SOF writing renaissance.

Lines of Effort

LOE 1: Establish Senior Leader Reviewer-Advisors

USSOCOM assigns responsibility to select officers and NCOs

with experience and proficiency in professional writing in all relevant U.S. SOF command structures. Review Advisors (R/As) promote, receive, review, and submit professional writing from the force and advise and report on the program to commanders. These R/As also develop and maintain writing program initiatives, charters, and established parameters for special operations enterprise writing community goals in cooperation with the JSOU Press, the Harding Project, and various branch publications and educational partners.

LOE 2: Create Writing Incentive Programs

USSOCOM and JSOU must establish incentive writing competitions and recognition programs on a quarterly or annual basis to highlight people and papers that evoke thought, drive innovation, and affect change related to the USSOCOM priorities and special operations research topics. In cooperation with organizations such as the JSOU Press, *Special Warfare Magazine*, and the Harding Project, quarterly and annual calls for papers, given the necessary publicity, promotion, support, rewards, and benefits, are conducive to broad participation across the enterprise. Incentive writing programs are encouraged at every level, as the benefits of these programs remain true for any organization regardless of size or scale.

LOE 3: Launch the SOF Writing Community

USSOCOM and established R/As must promote and improve access to online writing communities through platforms, web pages, and applications for submitting topics, theses, ideas, and challenges. Online forums like the Army's Line of Departure web page promote the presentation and sharing of ideas, provide collaboration opportunities, and propose and address challenges facing the force. Access to rules, regulations, programs, webform generators, and effective writing tools promote turning ideas into action through writing, with the added benefit of bringing the force together.

> *Researching, drafting, rewriting, and reviewing during the writing process raises learning levels, helps focus messaging, and improves effective writing skills.*

Approach Effectiveness

A SOF writing renaissance must successfully address challenges and leverage existing opportunities through leader involvement and program efficacy. Desirae Gieseman explains in the article "Effective Writing for Army Leaders: The Army Writing Standard Redefined" that researching, drafting, rewriting, and reviewing during the writing process raises learning levels, helps focus messaging, and improves effective writing skills.[8] These principles, coupled with SOF leadership buy-in and promotion, are key to helping individuals see success and work toward enhanced leadership credibility and trust.

Creating R/As and writing incentive programs will result in more credible writing resources for aspiring SOF author-practitioners, improve organizations through crowd-sourcing innovative ideas, and provide a reciprocal line of flattened communications across the enterprise.

Potential quarterly USSOCOM Commander's Papers and JSOU President's Papers initiatives published and presented to the force provide incentives to SOF practitioners to attack and address relevant issues to improve the enterprise. The Harding Project and the resurgence of branch magazines and journals are already providing resources, guidance, and a viable outlet for the SOF writing renaissance to materialize, with the potential for it to be a cornerstone of the USSOCOM Commander's PEOPLE LOE.[9]

There is an opportunity for a new beginning. USSOCOM can trace the dawn of the SOF writing renaissance to the newest

> *Winning starts with people, and this is where the revolution of professional writing in SOF begins.*

generation of JSOFSEA graduates, who serve as a shining example of what research and writing make possible—not only for leader-warrior-diplomats but also for the enterprise itself and the defense of this great nation. The USSOCOM Commander's vision of strengthening leadership, trust, and ethics in the special operations enterprise is within the grasp of all who volunteer to live the SOF truths and lead in this new era of SOF.

Education, access to resources, and promotion of writing initiatives from leadership will result in a new generation of warriors who are poised and ready to tackle any conflict, mission, aggression, or problem set the world has to offer. Winning starts with people, and that is where the revolution of professional writing in SOF begins.

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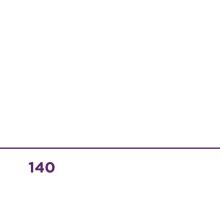
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PART III

WIN

BACKGROUND: China and Russia rely on anti-access/area denial activities, coercive behavior, and malign activities to produce warfighting advantages and neutralize the effectiveness of conventional forms of deterrence.

FOCUS: Understanding the PRC and Russian way of war

QUESTION: How can the SOF enterprise leverage asymmetric options and new forms of irregular warfare to fill critical gaps in joint force capabilities to prevent, prepare, prevail, and preserve against near-peer competitors (e.g., Russia/PRC)?

Leveraging SOF to Curb People's Republic of China Ambitions in Our Backyard

By Major William A. Carpenter

Introduction

The Belt and Road Initiative (BRI) has been a strategic foreign policy driver of the People's Republic of China (PRC) since 2013 and represents its salient stratagem toward outpacing the U.S. in great power competition (GPC). While the initial thrust of the effort was directed toward Asia and Europe, the venture gained considerable momentum, advancing across Africa before working to gain a foothold in America's backyard. The U.S. has enjoyed 200 years of dominance in the Western Hemisphere, as advocated via the Monroe Doctrine and later the Roosevelt Corollary, yet finds itself rudderless as strategic competition threatens to undercut this preeminence.[1]

In the span of two decades, the PRC has evolved from peripheral actor to central player in Latin America, surging direct foreign investments while becoming the region's second-largest trading partner and the largest single commercial partner within most Latin American countries.[2] The machinations of BRI appear calibrated to fundamentally change the world's behavioral patterns toward economics, culture, and security in ways that benefit the agenda of the PRC and the Chinese Communist Party (CCP).[3] The 2020 National Defense Strategy asserts that "The United States is engaged in global competition to advance U.S. interests and gain enduring strategic advantage." While all instruments of national power will be required to sustain this campaign, the role of U.S. Special Operations Forces (SOF) will be essential to delivering a potentially decisive advantage to U.S. policymakers.

How Can SOF Compete for Influence in South and Central America?

In the context of BRI and GPC, the end goal beyond materiel resources is to build structural influence and leverage. SOF can compete in Latin America by countering the malign influence of the PRC/CCP through the continuation and expansion of partnership-

> *SOF can help partner nations improve their capabilities, capacity, and resilience through security cooperation, intelligence sharing, exercises, and training programs while upholding democratic values.*

building with countries in the region. SOF can help partner nations improve their capabilities, capacity, and resilience through security cooperation, intelligence sharing, exercises, and training programs while upholding democratic values. SOF can also conduct classic information operations to expose the malign activities of the PRC—such as predatory economic practices, human rights abuses, and domestic interference—and highlight project failures.[5] By working with regional partners, SOF can counter PRC activities that erode U.S. influence, challenge democratic values, undermine basic human rights, exacerbate social and economic tensions, and fuel corruption. SOF play a pivotal role in supporting the endeavors of other U.S. government agencies to impose costs on PRC actions that threaten regional security and sovereignty. The PRC adopts various methods to enhance its access and influence in the Western Hemisphere, employing subtle and overt, as well as economic and political approaches.[6] The Joint Military Information Support Operations (MISO) Web Operations Center is a U.S. Special Operations Command (USSOCOM) entity conceptually tailored to affect positive outcomes in GPC through the conduct of MISO in the digital realm. This organization needs to be properly resourced as an essential 24/7 asset. Doing so would allow it to be leveraged effectively and consistently to create wins in the information space by accurately and persistently highlighting the aggressive and coercive tactics of adversaries at scale.

There are no definitive winners or losers in GPC, and it has no definable conclusion, thus making it difficult to sustain the high

level of effort required across the spectrum of conflict.[7] A long-term strategy with clearly delineated markers of incremental success must be implemented to ensure diligence for the long haul.

How Can this Command Best Assess Regional Relationships?

In assessing regional relationships affected by BRI engagements, USSOCOM must leverage a plethora of interagency partners (e.g., CIA, U.S. Department of State) through the framework of Joint Interagency Task Force South to gain a clear, multifaceted picture of the competition space. Leveraging new SOF capabilities in the realm of publicly available information and open-source intelligence, while applying sentiment analysis and machine learning data analytics, could yield an efficient and accurate mosaic for commanders and policymakers in nearly real time.

> *Leveraging new SOF capabilities in the realm of publicly available information and open-source intelligence, while applying sentiment analysis and machine-learning data analytics, could yield an efficient and accurate mosaic for commanders and policymakers in nearly real time.*

While embracing new capabilities, SOF engagement in Latin America should also lean into traditional approaches, continuing to increase the frequency and scale of joint combined exchange training (JCET) missions. JCETs offer U.S. SOF opportunities to train in regional environments for which they may deploy, while the host nation's special forces units receive the inherent benefits of training with U.S. SOF personnel. Per Department of Defense

(DoD) Instruction 3902.1, the exchange of knowledge, tactics, language, and culture is the largest part of the desired outcome of the training. This exchange aligns with the strategic goals of the geographic combatant commander and advances U.S. strategic objectives while providing a clear picture of the human terrain.[8] U.S. SOF are "ideally suited to identify a competitor's coercive activities and counter them with precise, scalable, and credible all-domain options for the joint force."[9] To this end, the U.S. Army's 1st Special Forces Command recently conceptualized opportunistic and overt information gathering, leveraging deployed SOF personnel as a network of strategic sensors. As long as U.S. SOF consistently deploy to the lion's share of countries in the region, they will be in position to gather information that benefits combatant commanders, policymakers, and analysts as they seek to understand the competition space via the contact layer.[10]

What Are the Best Options for Rebuilding Influence?

The BRI is a case study in gray zone competition, but the competition space and methodologies required for achieving a dominant position in GPC are more aptly described as political warfare. Political warfare is played out in the space between diplomacy and warfare, seeking to influence, persuade, or co-opt through population-centric engagement.[11] Fundamentally, the best options for rebuilding influence lie in the first SOF truth, "Humans are more important than hardware." The human domain-centric tasks assigned to SOF are optimized to provide a military contribution to a national political warfare capability.[12] These capabilities need to be deployed south in earnest. GPC has evolved, and U.S. national security decision-makers need to resist the real potential to overemphasize competition with the PRC in Asia at the expense of other critical regions worldwide.[13]

Great power competition has evolved, and U.S. national security decision-makers need to resist the real potential to overemphasize competition with the People's Republic of China in Asia at the expense of other critical regions worldwide.

Time is an essential element for success in this competition space. The mutual partnership between Colombia and the U.S. has spanned over three decades, beginning with National Security Decision Directives issued by then-President George H.W. Bush.[14] The counter-narcotics struggle and perennial SOF engagement opened the door to additional close cooperation on issues like human rights, trade, and economic development.[15] Demonstrated through U.S. efforts in Europe, Japan, and South Korea, persistent engagement over decades is the most viable method for achieving national objectives. Colombia can also be viewed as a cautionary tale, illustrating the downside of incremental intervention, self-imposed barriers, and a lack of political will to accomplish a difficult task quickly and effectively.

How Can We Prevent or Minimize Adversarial Entrenchment?

To prevent or minimize PRC entrenchment through the BRI in Latin America, the U.S. and its allies should focus on offering competitive alternatives, supporting institutional capacity, and strengthening democratic institutions.

The first step is recognizing that China is already there to stay. For all the (legitimate) handwringing over PRC commercial ventures in Panama, the Chinese diaspora there originated in 1854 and now numbers more than 200,000 (5 percent of the populace). For comparison, there are roughly 25,000 U.S. expats living there.[16] The

recent commentary by President Trump has thrust the Panama Canal to the forefront of U.S. strategic discourse, calling into question the efficacy of the 1977 Torrijos-Carter Treaties.[17] Panama Canal access and functionality are U.S. geopolitical imperatives. As the primary user of the canal and the largest vector of foreign direct investment, the U.S. carries significant sway in Panamanian decision-making, to say nothing of the treaty stipulation authorizing the U.S. to use military force to defend the canal against any threat to its permanent neutrality.[18] SOF represent a key element of integrated deterrence in the Canal Zone, via timely information gathering and the credible threat of direct action. Panama was the first Latin American country to align itself with BRI. On February 3, 2025, it became the first to officially leave, following a single visit from newly minted U.S. Secretary of State Marco Rubio. This is a game we can win.

> *Using Latin America to the mutual benefit of the U.S., Japan, Korea, Taiwan, and European allies while displacing People's Republic of China influence is a key to winning at great power competition.*

Carrots and sticks must be properly employed in this effort. SOF can support a grander U.S. paradigm-shifting strategy to grow the socioeconomic resilience of this hemisphere by reshoring production to the Americas and spurring foreign investment from domestic U.S. sources, as well as from our Asian and European allies and partners.

Using Latin America to the mutual benefit of the U.S., Japan, Korea, Taiwan, and European allies while displacing PRC influence is a key to winning at GPC.[19]

What Are the Biggest Threats Emanating from Adversarial Influence in the Region?

As BRI has permeated Latin American countries, a corresponding rise of authoritarianism, weaponized corruption, and high-tech surveillance tactics has emerged that threatens to undermine democracy and destabilize the region. Chinese organized crime, with possible state support, is also implicated in Central American drug trafficking and money laundering activities, which are key drivers of over 100,000 annual overdose deaths according to the U.S. Centers for Disease Control and National Institutes of Health.[20] A concerning association between Chinese engagement and democratic backsliding is stark, as Latin America has experienced this phenomenon more than any other region since 2008. In Venezuela, Ecuador, and Bolivia, the PRC has played a key role in developing methods of mass surveillance and social control. In Peru and Brazil, opaque PRC business practices have exacerbated corruption, fomented social unrest, and spawned lobby groups for PRC interests.[2]

> *SOF elements must use the lens of irregular warfare to achieve a more politically informed understanding of the human terrain to address the myriad irregular challenges to our south—such as organized crime and information warfare—and improve the longstanding "by, with, and through" approach to irregular warfare.*

PRC loans often have fewer conditions attached, but dependence on them can push economically unstable countries, such as Venezuela, into debt traps that are likely to lead to default.[22] Despite President Xi Jinping's repeated benign assurances, the BRI maritime projects clearly appear to be expansionist. The Panama-Colon Container Port is a recent construction project built with

autonomy—by the same firm dredging islands in the South China Sea—to the same specifications as the PRC naval port on the Bab el-Mandeb Strait.[23] A $3.5 billion port recently completed in Peru will serve as a fulcrum for a land–maritime trade corridor between the PRC and Latin America.[24] Factoring out Mexico, the PRC is easily Latin America's top trading partner, and China owns dominant positions in the mining industries of a region that commands as much as 60 percent of global lithium deposits.[25] Latin America is also home to the largest collection of space-tracking infrastructure outside of mainland China.[26]

Can SOF Mitigate the Effects of Adversarial Influence Without Directly Competing?

BRI is a methodology that enables the PRC to practice irregular warfare (IW) against peer nation-states. SOF elements must use the lens of IW to achieve a more politically informed understanding of the human terrain to address the myriad irregular challenges to the south—such as organized crime and information warfare—and improve the longstanding "by, with, and through" approach to IW.[27] The U.S. could use the broader rubric of partnered counter-transnational criminal organization (TCO) operations to employ various elements of strategic disruption and a counter-threat finance approach, thereby mitigating adversarial influence without necessarily engaging in direct competition using assets already in place across the U.S. DoD—including USSOCOM—such as the counterdrug-funded analysts supporting interagency efforts to illuminate TCOs. In this particular use case, forensic analysis found TCOs aligned with Russian private military companies, providing the legal basis for interagency partners to deny visas, issue sanctions, and seize assets and monetary instruments belonging to the malign actors.[28] The ability to understand how funds, licit and illicit, flow through Latin America is essential to countering TCO-initiated threats to the U.S. southern border.[29] Leveraging those tools

to understand the full extent of PRC economic levers in the region will also be essential to influencing or thwarting them indirectly. It could also be useful for U.S. intelligence agencies to refrain from over-classifying the essential information that country leaders need to understand the risks of relying on PRC state-owned enterprises for key infrastructure and appeal to partner sovereignty in these matters.[30]

> *Make no mistake: The actions taken in the next decade vis-à-vis the People's Republic of China/Belt and Road Initiative will determine the victor in this struggle of visions for the future of human civilization.*

Conclusion

While this era of strategic competition may bear similarities to the Cold War, the situation is in many ways far more complex and intractable. Unlike the Soviets, the PRC is "the only competitor potentially capable of combining its economic, diplomatic, military, and technological power to mount a sustained challenge to a stable and open international system," and, in the words of Director of National Intelligence Avril Haines, the PRC is an "unparalleled competitor."[31] The U.S. and its SOF community must recognize the scope of the struggle ahead, recognize that it possesses the required tools to meet the challenge, and apply these tools in a thoughtful and strategic manner. Various cultural domains provide opportunities to foster closer connections and a shared identity with U.S. Latin American partners through commercial engagements, deployed military partnerships, or the dramatic expansion of opportunities afforded to attend U.S. professional military education institutions—China currently offers five times as many slots as the United States.[32]

However, make no mistake: The actions taken in the next decade vis-à-vis the PRC/BRI will determine the victor in this struggle of visions for the future of human civilization. The U.S.—along with its allies and partners—needs to push back against PRC/BRI security, commercial, and information-sharing arrangements, which are used to create economic and critical infrastructure monopolies that provide leverage for the agenda of the CCP. The U.S. must carve out the fiscal resources and intellectual capital necessary to fortify this hemisphere, enabling it to resist the designs of the CCP. To excel in Latin America and achieve national objectives, U.S. SOF units must be properly manned, trained, and equipped. A coherent strategy is necessary to allow SOF to enable elements of soft power. The U.S. must assign a similar significance to the Darien Gap that was once enjoyed by the Fulda Gap during the Cold War or risk being overrun.

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Wargaming Long-Term Victory in the Israel–Hamas Conflict: Lessons from Psychological Operations, Counterinsurgency, and Human Nature for a Sustainable Outcome

By John A. Kirbow

Demonstration for standing with Palestine in Tunisia Tunis Kassba square.
Source: Wikimedia Commons. (Photo by Brahim Guedich)

Jerusalem, Dome of the Rock, Church of the Holy Sepulcher in the background.
Source: Wikimedia Commons. (Photo by Berthold Werner)

Introduction

A sustainable end-state for Israel involves marginalizing or removing Hamas-style militant movements and leadership within Palestinian territories coupled with fostering conditions of civil society and stability for Palestinians to prevent large-scale insurgencies from reemerging.

Such an approach must use a doctrinal risk assessment and military decision-making methods to identify limitations, constraints, and risks and compare courses of action. These methods are informed by human behavioral science, game theory, and essential lessons drawn from the nature of insurgency and counterinsurgency.

The wider aim is to provide a framework. The framework ideally equips leaders and analysts, including Israeli decision-makers to move toward stability and, ultimately, an end-state that is both achievable and sustainable.

Wargaming a Best Way Forward

Many people, from Arab and Israeli leaders and statesmen and scholars to high-ranking U.S. military thinkers, have put forward the argument that there must be a *solid, viable*, and *workable* statehood solution for Palestinians as a starting point.[1] From there, possibilities exist for the expansion of peace, for trade and commerce, for dialogue and diplomacy, and for a growing ability of Palestinians to engage in negotiations for increasing their claims in a way that avoids armed conflict, insurgency, and fanaticism or the idea of mass violence or displacement of millions of Jewish people.

Perhaps most importantly, such a solution would create an unprecedented opportunity for Palestinians to truly develop their own institutions of economic prosperity and civil society. But it must be realistic and genuinely sensitive to the generations of suffering

and deep aspirations of the Palestinian people—and feature an acceptance of Israel's basic security.

The term layered two-state model is used to denote a realistic, building-block approach (via *layered effects*) in which incremental steps must occur. At minimum, these steps include the prerequisite ceasefire and hostage release, followed by large-scale humanitarian rebuilding; serious talks of an initial-state Palestinian statehood acceptable to both sides (perhaps seen as a starting point to give Palestinians breathing room to transition from a Hamas model to a diplomatic one that allows investment in their infrastructure, economy, and civil society); an Arab-led coalition peacekeeping force to create conditions of *transitional* stability; and an assurance that such a plan would exclude violent militant groups like Hamas moving forward.

A two-state model can arguably not occur all at once due to Israeli fears of more attacks and attempts at mass displacement and violence—something pointed to in game theory due to the lack of trust on either side when there aren't reasonable safeguards and assurances by the opposing side. This model would thus have to happen in layers, with security, rebuilding, and a gradual statehood— again, something that requires a safe zone and considerable global investment in rebuilding and development. See Figure 1.

While such a way forward is not without significant challenges (and would no doubt come with considerable debate on both

| Prerequisite ceasefire and hostage release | Large-scale humanitarian rebuilding | Transition to civil society + rebuilding and development |
| Arab-led coalition peacekeeping force | Initial-state Palestinian statehood talks | |

Figure 1. Summary of proposed layered effects for a two-state strategy. Source: Author

sides), many feel it needs to happen—and that no alternative is truly viable and sustainable for either side. Encouragingly, many Arabs and Israelis —including their leaders—understand this deeply and support it, though their voices are often swept under the rug of toxic discourse and ultra-partisan rhetoric.[2]

A view from a Blackhawk over Baghdad during a PSYOP deployment. The landscape was very much defined by the human terrain - the needs and aspirations of the local population, and the realities on the ground.

Success or failure to understand and respect this was often decisive. The centrality of the population's needs must never be underestimated.

This must be a lesson carried over to understand why Hamas sprung up in Palestine and what it will take to avoid this in the future.

Figure 2. War zone parallels. Source: Author-created graphic including author photo taken in Baghdad 2006

The question is whether it's possible to demonstrate this more concretely by drawing on and combining insights into human behavior, insurgency/counterinsurgency, and military risk and decision-making methodology. See Figures 2 and 3.

Human Behavior and Game Theory

Insurgency and Counterinsurgency

Military Planning and Decision-Making Ideals

Figure 3. Major factors informing the two-state strategy approach. Source: Author

In this case, another important question comes into play: What happens when an irresistible force meets an immovable object? This refers to the Palestinian aspiration for self-determination and self-development (starting from acceptably habitable and humane

conditions) mutually colliding with Israel's need for assurance of safety from terror, subjugation, displacement, or massacre. Israel fears various levels of coexistence with Palestinian statehood, and Palestinians seek out statehood and a release from their long-standing conditions. This impasse has enabled an endless cycle of conflict and insurgency seen through the strategic paradigm of a zero-sum (i.e., win-lose) game.

It is necessary to examine the impasse through the lens of realism and respect for the nonnegotiable boundaries of both peoples on certain aspects of dignity and security. While any solution will upset many on both sides and require some considerable compromise, such compromise will be the lesser of evils and the best options. See Figure 4.

- On the one hand, Palestinians need to be free from the immiserating conditions they have been living under for decades. They need a Palestine—in at least *some* form—that is habitable, sustainable, and genuinely *theirs*, granting them the dignity of self-determination and a recognition of their identity.

- On the other hand, Israelis need to be able to live safely and in a way that ensures a sustainable security for their lives and families and fundamental dignity amid the ongoing reality of radical ideology, anti-Jewish hate, and historic persecution— in particular in Muslim-majority countries.

Palestinian dignity and freedom **+** The security of Israel's people. → There must be a solid, viable, and workable statehood solution for Palestinians.

This must also allow Israeli people to be safe.

Figure 4. Reconciling critical factors at play. Source: Author

A solid plan for Palestinian statehood, even as a starting point, must happen. It is the only way to permanently break the endless cycle of violence and suffering and ensure lasting, durable peace and security for all.

As social scientist Robert Wright talks about in his book *Nonzero*,[3] conflicts must eventually shift from a zero-sum status quo into something more sustainable where the nonnegotiable, core interests of both groups can be acknowledged on some level. There has long been an unsustainable zero-sum game between Israeli security and Palestinian self-determination—at some point, both peoples have to move beyond this to bring everyone into a win-win.

A Layered Two-State Approach to Lasting Peace: A Social Scientific and Military Perspective

Any strategic or operational planning graphic that shows the spectrum of conflict should also show that combat operations are never the sole component—they involve a transition period, a movement toward stability, and most ideally, an end-state that is both achievable and sustainable.

Getting to this end-state requires wargaming options and comparing courses of action (COAs) using a framework established during mission analysis of limitations, constraints, and assets. Red teams involve "devil's advocate" ways to run military, cyber, and (as is most relevant here) social simulation to help planners see their blind spots, such as the way insurgencies can be refueled and reconstituted by a failure to address core grievances of the local population or understand systemic root causes of conflict where more than a military solution is needed. In other words, the planning process must help us understand what can and can't be done realistically. A common theme here is the human layer, where planners seek to understand how different actors, from wider civilian

Table 1. Summarized Israeli Cost/Benefit/Risk Table for a Layered Two-State Approach

Identify and Assess Risks (Hazards)	Implement Control Measures	Reevaluate Risks	Evaluate Outcomes
Palestinian militants capitalizing on expanded territory and/or statehood	Arab-led coalition peacekeeping force Global assurance of large-scale humanitarian rebuilding Initial-state Palestinian statehood talks backed by Arab regional partners, Israel, U.S. government, and other global entities	Unpredictability and uncertainly reduced through a combination of a peacekeeping force and global promises of initial-state Palestinian statehood negotiations	*To be determined*
Appearance of "weakness" via perception of Israel responding "too early on" after October 7 attack with statehood offer (future attacks even more incentivized)	Reframe the narrative (via coordinated, open regional partner messaging) as the continuation of long-standing negotiations, including drawing on recently deceased President Jimmy Carter's Camp David legacy Frame the offer in light of Arab regional partners, not a response to Hamas Frame as win-win for Israel and Palestine, not a zero-sum win-lose scenario	Perception management by global reframing lowers the risk level	*To be determined*

Source: Author

populations to various key leaders, realistically respond. See Tables 1 and 2.

This involves taking a closer look at limitations, constraints, risks, and COA comparisons. Informing this will be insights into behavioral science and game theory as well as core lessons learned from the nature of insurgency and counterinsurgency. A closer look uses these areas to show:

- Why the two-state model seems to be the most practical, logical starting point for any future coexistence—even for a hypothetical eventual (democratic pluralistic, peaceful) one-state solution for those who advocate that model

- The most likely COA to get there as a *phased, strategic approach* to guide future short- and long-term plans

An understanding of insurgency and counterinsurgency and what truly achieves a durable end-state is where to start. Intrinsic to this is a level of human insight. There are lessons from both human nature and decades of insurgency around the world, including from post-9/11 experiences abroad, that must be taken into account. Chief among these lessons is the fact that a void of deep-seated grievances and suffering are frequently filled by violent response, often in the form of insurgency, civil disruption, conflict, and well-organized terrorism.

More broadly, people cannot be kept under certain conditions indefinitely without serious consequences. Humans inevitably strive to better their condition and resort to increasingly desperate means when they feel they have no other options. This is, of course, not a moral endorsement of insurgency and terror but (loosely speaking) a law of nature—or more concretely, an undeniable observation of human behavior across geography and culture. Ignoring this observation is bad for everyone, including the Israeli people and leadership. This is due in no small part to a wider existential, long-term risk the status quo poses for Israel as a whole.

Game theory and human behavior are central to understanding a way forward. They describe how both sides realistically operate based on some of their strongest driving motivations, trust issues, and nonnegotiable aims. For Palestinians, this is a habitable and self-determined Palestine; for Israel, it's the assurance of their enduring safety. Failing to be realistic about the driving motivations of how people respond increases the likelihood of failure to persuade and elicit desired behavioral changes—in this case, mutual cooperation. This is a basic factor for persuasion on any level.

These are among the fundamental understandings necessary to regard how humans operate and respond. They apply to individuals, groups of people, organizations, and entire nations or national identities. Any grand solutions are likely to fail if there's an unrealistic

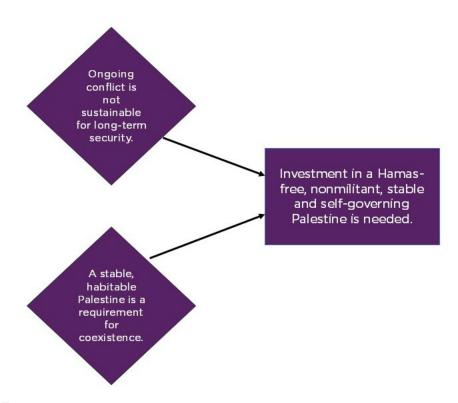understanding of what Israelis and Palestinians may respond to.

Adapting Elements of the Military Decision-Making Process

A practical way to implement previously presented concepts is examined by adapting the framework for the military decision-making process (MDMP), an in-depth and complex analysis and decision process.[4] The status quo of the ongoing conflict between the Israel Defense Forces (IDF) and Hamas is compared with a strong version of a two-state model, using some key assessment tools for risk management and COA comparison. As mentioned, an understanding of insurgency/counterinsurgency dynamics, informed particularly by a lens of human behavior, is incorporated into this (shortened and abbreviated) decision-making and risk management approach.[5]

Limitations and Constraints

It is clear from both the perspective of human nature and history, as well as from ongoing observations, that neither side is likely willing to compromise on these basic premises. Both are ultimately nonnegotiable, leading to a need to reconcile the irresistible force (Palestinian dignity and freedom) with the immovable object (the security of Israel's people from mass displacement, subjugation, or large-scale massacre). No arrangement is close to perfect, but any solution that allows these two things to simultaneously exist—however short of expectations—is far better than any possible version of the status quo. The current paradigm of ongoing conflict between Israel and militant Palestinian leadership factions like Hamas is morally and politically unsustainable. The cycle must be broken.

There are two fundamental premises. Premise 1 says that ongoing conflict isn't sustainable for long-term security (for

Figure 5. Reconciling unavoidable realities as a way to visualize constraints. Source: Author

Israel or the wider area). Premise 2 is that Palestinians both morally and practically (i.e., in light of conflict resolution) need their core grievances addressed—a stable and habitable Palestine in some form in which they can exercise self-determination.

Using simple logic, these two fundamental premises not only exist—they lead to an arguably unavoidable conclusion. If both premises are accepted, it means that some level of Palestinian self-determination and habitability are needed, and that this must be compatible with basic security for the Israelis.

For wargaming purposes, the two previously mentioned limitations, (1) human behavior and game theory, and (2) the nature of insurgency, can be examined.

Limitation One: Human Behavior and Game Theory Constraints

Game theory was somewhat popularized by the 2001 film *A Beautiful Mind,* which was loosely based on one of its chief contributors, the brilliant John Nash (played by Russell Crowe).[6] Game theory is, broadly speaking, a set of tools for looking at everything from sexual pursuit in a bar, gambling in a casino, prisoner behavior during a breakout, and conflict resolution among rival gangs to cooperation and conflict among people, groups, or entire nations.[7] In short, it is about how people respond to risk, reward, and uncertainty amid various "rules of a game," where "players" in the game don't know how other players behave, making decisions about cooperation or betrayal all the more problematic.[8] The more uncertainty, the more difficult the problem. Will other players cooperate for everyone's greater benefit or defect for their own self-interest (often because they fear others will do the same)? See Figure 6.

These driving motivations are especially relevant in the presence of what game theory and behavioral economics refer to as *imperfect* or *incomplete information*, where the various actors involved (in this case, Israel and Palestine) don't know how other "players" will respond.[9] In the absence of reasonable assurance that one side will not attack or break a promise to the other, for example, players are often more inclined to adopt what they consider to be safer strategies out of basic self-interest.

Limitation Two: The Nature of Insurgencies, Cycles of Violence, and Power Vacuums

First, long-standing insurgencies are often highly adaptive. A defining feature of insurgencies is that they can be highly decentralized and adaptive (the book *The Starfish and the Spider: The Unstoppable Power of Leaderless Organizations* famously

Palestinians don't trust Israel to offer suitable compromise or keep promises; they think they'll just keep expanding.

Israel doesn't trust Hamas (or the Palestinian government in general) to refrain from attacks once they have statehood.

Game theory describes how people respond to risk, reward, and uncertainty amid various "rules of a game," such as two sides of a conflict deciding whether to work together (cooperative behavior) or to "defect" out of fear and distrust of the opposing side.

Figure 6. An overview of how to visualize game theory in the Israel-Hamas conflict. Source: Author

makes this case), often able to continue with minimal top-down bureaucracy. This bears some similarity with Iraqi insurgent groups, which would operate as a patchwork of various factions and organizations, frequently with splinter cells.[10]

Second, suffering and a loss of hope tend to create conditions ripe for violent groups to fill the vacuum under the guise of protection, governance, services, a sense of identity, and the galvanizing force of moral outrage as well as hope and a sense of liberation.[11] Many witnessed this dynamic on some level, where militant Sunni or Shia groups would offer such narratives of hope, identity, and resistance as a way to expand inroads into their respective populations.[12] See Figure 7.

Risk Assessment Formula: A Basic Conception

The formula for assessing risk—and thus, how to implement control measures to manage and reduce that risk to acceptable levels—is not just about the chance of an event occurring but the consequences people would face should it occur.[13] See Figure 8.

This concept is fundamentally embedded within U.S. military planning and operations doctrine at all levels. The U.S. Army's Risk Analysis Matrix determines levels of risk based on the probability (i.e., likelihood that an event will occur) and the severity of the event, should it occur.[14] See Figure 9.
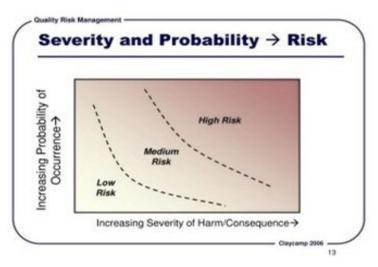
Camp Victory, Iraq was one of three coalition installations occupying Radwaniyah Palace, Saddam Hussein's main palace. A PSYOP unit operating out of the Green Zone and Camp Victory continuously examined the Iraqi insurgency from a root cause perspective. A sustainable path toward stability was a prime challenge in Iraq; the same challenge in the Israel-Palestine conflict is considerably more difficult.
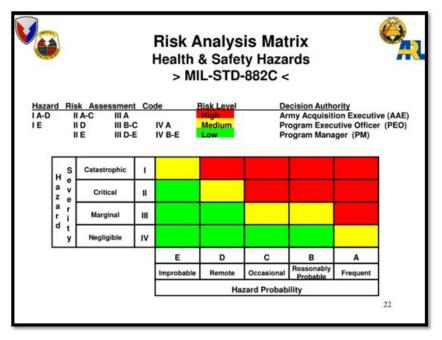
Figure 7. Insurgency parallels across war zones. Source: Author-created graphic

The nature of risk over long periods must also be examined, such as with the ongoing, indefinite status quo between Israelis and Palestinians. In simple everyday terms, imagine the fairly low risk of injury or death from not wearing a seatbelt during a single trip, or even a few short trips over the span of a year. However, if an individual never wears a seatbelt (or regularly drives without wearing it), the risk of injury or death adds up significantly over the years. See Figure 10.

The same logic applies on a larger scale to attacks like October 7 eventually occurring again over time. This could include cyberattacks and multifaceted regular and irregular warfare (IW)attacks, such as the launching of incendiary kites and balloons over the border to
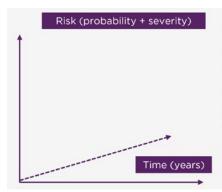
Figure 8. How probability and severity work together to create risk. Image from SlideServe; see endnote 17.

Figure 9. An example of risk analysis as used by the military. Image from SlideServe; see endnote 18.

set Israeli crop fields on fire in April 2018 or the post-October 7 Gaza-based threat actor targeting of Israeli defense, private-sector,

Risk (probability + severity)

Time (years)

As a general principle, risk adds up over time. This is especially true given the reality of endless proxy wars, Iranian influence, rebooted insurgencies, and continuously evolving tactics as innovative as they are destructive.
Add on the risk (however low the probability, the severity is quite high) of proxy nuclear weapons or regional (or even in theory, global) war. The status quo of Palestinian suffering and a lack of self-determination enables the perfect vacuum of these threats– something fundamentally contrary to Israeli long-term security. If there is ever a non-zero case where humanitarian and pragmatic concerns merge into one, this is it.

Figure 10. How risk can increase over time. Source: Author

Table 2. Summarized Israeli Cost/Benefit/Risk Table for the Status Quo

COST	BENEFIT	RISK
Endless proxy wars, Iranian influence, rebooted insurgencies	Short-term military aims	Future terror attacks
Strengthening of insurgent and terrorist organizations		**Geopolitical isolation** by more of the world community
The wider region becoming a breeding ground of proxy wars by hostile powers like Russia and Iran		**Proxy nuclear weapons** or **regional** or even (however unlikely) **global war**

Source: Author

telecommunications, and energy organizations. It could even include the possibility (however remote) of proxy nuclear capabilities or large-scale escalatory war affecting the wider region and globe.[15]

Using this fundamental understanding of risk, a basic risk matrix can be envisioned for the status quo of the IDF versus the Hamas model, particularly when lacking a serious line of effort for a layered two-state solution. A refined risk assessment for COA 2—the layered two-state approach—can then be applied.

Cost/Benefit/Risk Analysis. A simplified visualization illustrates how the costs, benefits, and risks of a layered two-state strategy can be weighed. This involves comparing the Hamas versus IDF status quo of ongoing conflict with the two-state phased plan. Refer to Tables 2 and 3 for a more complete version.

Course of Action 1: Ongoing conflict (IDF versus Hamas, without a long-term stability plan for Palestine)

Cost: Ongoing insurgency and failure to achieve a sustainable end-state

Benefit: Short-term security

Risk: Increasing risk over time for terror attacks and proxy (or even regional) wars

Course of Action 2: A layered two-state approach

Cost: Difficult to achieve, lack of buy-in by many; would involve significant debate within both sides

Benefit: More likely to achieve a sustainable end-state and end the Hamas model

Risk: Militant actions seizing on Palestinian statehood

Table 4 shows a hypothetical decision support matrix, where each decision factor (in the column on the left) is assigned a

Table 3. Summarized Israeli Cost/Benefit/Risk Table for a Layered Two-State Approach

COST	BENEFIT	RISK
Difficult to achieve, lack of buy-in by many Time-consuming process with possible gridlock Would involve significant debate within and between both sides	Possibilities for more durable peace via Palestinian trade, commerce, and self-development More room for dialogue and diplomacy; Palestinians can better engage in negotiations for increasing their claims in a way that avoids armed conflict, insurgency More ability for Israel to demand the removal of militant terrorist groups from Palestinian leadership and from their political paradigm (and thus, more assurance for Israelis against mass violence or displacement during a two-state solution)	Some risk of Palestinian **militants capitalizing** on expanded territory and/or statehood via various types of attacks **Failure to ensure** that a Hamas-style militant organization does not derail the process **Misuse of redevelopment funds** for sectarian terror and insurgency aims (or general corruption) if a reliable Palestinian government and international oversight is not in place

Source: Author

multiplier number on a scale of 1–3 (shown in blue), with 3 being highest, depending on how well the COA likely achieves each factor. This helps weigh factors by multiplying them by their assigned weights (i.e., their importance). Any real-world, high-level strategic or operational assessment of this kind is more methodical in approach, with the input and expertise of a large staff; this is for illustrative purposes only.

While these values are subjective, the maximum value (5) can be arguably assigned to all factors. Even if the values are changed (assigning factors 1–5, 4, or even 3), a decision support matrix more heavily weighs COA 2.

Conclusion

The massive humanitarian crisis in Gaza must be addressed. The continuation of terror threats and IW—problems enabled by a vacuum of instability, the adaptive nature of insurgency, and

▌ **Table 4.** Criteria Weighting Based on Priorities

FACTOR	WEIGHTED CRITERIA/ ASSIGNED VALUE (1–5)	REASONING
Sustainable, long-term security	5	Essential for a sustainable end-state that avoids ongoing conflict
Addressing root causes of insurgency	5	Essential in enabling the first factor
Possibilities for Palestinian trade, commerce, and self-development	5	Essential in enabling the first factor *Demands ground-up humanitarian rebuilding*
Dialogue and diplomacy	5	Enables transition away from violence and helps break the cycle of insurgency versus IDF
Trust in a cooperative security framework	5	Essential in enabling *all previous factors*
Short-term elimination of Hamas and related militant capabilities	5	The immediate crippling of Hamas and related militant group capabilities from within Gaza

▌ Source: Author

Table 5. Decision Support Matrix

COAs / FACTORS	COA/Approach/Strategy 1	COA/Approach/Strategy 2
	Ongoing conflict (IDF versus Hamas, without a long-term stability plan for Palestine)	A layered two-state approach
1. Sustainable, long-term security	1 x 5 = 5	2 x 5 = 10
2. Addressing root causes of insurgency	1 x 5 = 5	2 x 5 = 10
3. Possibilities for Palestinian trade, commerce, and self-development	1 x 5 = 5	2 x 5 = 10
4. Dialogue and diplomacy	1 x 5 = 5	2 x 5 = 10
5. Trust in a cooperative security framework	1 x 5 = 5	2 x 5 = 10
6. Short-term elimination of Hamas and related militant capabilities	3 x 5 = 15	1 x 5 = 5
TOTAL	40	55

Source: Author

the malign nation-state proxy conflicts that capitalize on these realities—must also be addressed.[16] The ultimate goal should be a sustainable end-state that marginalizes or removes Hamas-style militant movements and leadership within Palestinian territories while fostering the conditions of civil society and stability necessary to prevent large-scale insurgencies from reemerging.

There has long been an unsustainable zero-sum game between Israeli security and Palestinian self-determination. At some point, both peoples *have to* move beyond this and bring everyone into a win-win situation.

About the Author

Alongside a longtime interest in foreign languages and social science, **John A. Kirbow** served in Iraq (via the U.S. Army, including psychological operations) and Afghanistan (via the Human Terrain System under the Department of Defense) in various capacities, with an emphasis on understanding the nuances of culture, people, and how to effectively engage with them.

He has a long-standing background in psychological warfare and has focused on insurgency dynamics in and out of war zones and wargame training environments. Kirbow speaks non-native Russian, German, Spanish, Arabic, and, to a lesser, extent Farsi, French, Italian, and Swahili, and is currently learning Serbo-Croat, Greek, and Ukrainian.

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3. Robert Wright, *Nonzero: The Logic of Human Destiny* (Vintage, 2001), https://www.goodreads.com/book/show/9526993-nonzero.

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9. Esther-Mirjam Sent, "Behavorial Economics: How Psychology Made Its (Limited) Way Back Into Economics," History of Political Economy 36, no. 4. (2004): 735–760, https://muse.jhu.edu/article/178098.

10. Steven Metz, "The Internet, New Media, and the Evolution of Insurgency." *The U.S. Army War College Quarterly: Parameters* 42, no. 3 (2012), https://press.armywarcollege.edu/cgi/viewcontent.cgi?article=3058&context=parameters; Joel Dignam*, Decentralisation: The Starfish and the Spider* (The Commons, 2017), https://commonslibrary.org/decentralisation-the-starfish-and-the-spider/; Malcolm W. Nance, *The Terrorists of Iraq Inside the Strategy and Tactics of the Iraq Insurgency 2003-2014* (CRC Press, 2014), https://doi.org/10.1201/b17944; **Insurgency is fueled by the suffering and unmet needs of the population.** Insurgencies tend to feed off the grievances of the local population, fueled by ongoing cycles of conflict and violent exchanges. Misery and hopelessness create a void that gets filled by organized violence and militant ideology, often seen as the best or only choice amid a lack of

alternatives. An example many Iraq veterans remember is that of Madinat al-Thawra (Revolution City), later renamed Sadr City, an impoverished, heavily populated Shia suburban area in Baghdad, run de facto by radical Shia cleric Muqtada al-Sadr and his al-Mahdi Army. With this kind of political and ideological foothold, Hamas has been able to create its own narrative, resonating among a surprisingly wide segment of the Palestinian territories and across pockets of the wider Middle East (see next endnote).

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Asymmetric Approaches Across Domains: Recommendations for Engaging Smaller Countries to Counter Aggression

By Major Ronald J. Lienhardt

"It would be a war between an elephant and a tiger. If the tiger ever stands still, the elephant will crush him with his mighty tusks. But the tiger does not stand still. He lurks in the jungle by day and emerges by night. He will leap upon the back of the elephant, tearing huge chunks from his hide, and then he will leap back into the dark jungle. And slowly the elephant will bleed to death. That will be the war of Indochina." – Hồ Chí Minh, September 11, 1946.[1]

Introduction

Hồ Chí Minh's metaphor of the tiger against the elephant offers a timeless image of how smaller, less-equipped countries can challenge and overcome stronger, more conventionally capable adversaries. His quote, framed within the context of the approaching Indochina War, outlines the fundamental principles of asymmetric warfare—a method by which a disadvantaged country can compete and win against a more powerful foe. In the current geopolitical environment, smaller countries with limited military hardware and defense budgets have little hope of matching regional powers on any realistic timeline. Therefore, they must seek alternative methods of defense to counter political, economic, and military aggression against their sovereignty.

Asymmetric Warfare: A Primer

Asymmetric warfare is a country's approach to conflict to overcome a relative imbalance against a technologically or numerically superior adversary. Rather than attempting to match one's opponent, thinking and fighting asymmetrically means using dissimilar techniques and capabilities that complement strengths and conceal disadvantages through engagement in unexpected ways.[2] In this way, one does not have to match or surpass a superior force. One must only be able to exploit that force's vulnerability at a particular place and time. It is the evolution of the principles of the guerrilla of the 20th century: Vietnam's Võ Nguyên Giáp and the

Philippines' Ramon Magsaysay fought like tigers against the French and Japanese elephants. Today, similarly disadvantaged countries must recognize they are unlikely to grow into elephants; they must act like tigers or risk being crushed. A contemporary example can be drawn from air domain operations. A squadron of fourth generation fighters is no match for a larger wing of fifth generation fighters, no matter how heroically maneuvered. The money spent on procuring, maintaining, and employing such outdated manned aircraft may be better spent on dissimilar equipment employed unexpectedly and at different scales. In other words, quantity can be a quality of its own.

> *Asymmetric warfare is a country's approach to conflict to overcome a relative imbalance against a technologically or numerically superior adversary. Rather than attempting to match one's opponent, thinking and fighting asymmetrically means using dissimilar techniques and capabilities that complement strengths and conceal disadvantages through engagement in unexpected ways.*

Today, technological advancements have presented opportunities with lower financial risk and greater operational value. Dramatic advancements in the fields of robotics, machine learning, and system autonomy have inspired a recalculation of the cost versus effectiveness ratio, and it is here that smaller countries can get the most value from the many and simple compared to the few and complex.[3] Further, there is a continuous and corresponding cost decrease even as range, control, precision, and destructive powers increase. These advancements are increasingly shifting these systems from attractive alternatives to practical requirements.

Accordingly, a country that invests in a technological and operational approach in areas where its competitor still has an

advantage commits a strategy sin that is also a significant financial burden. Instead, a sustainable competitive advantage must be identified, and investments must be made in areas that put that country on the right side of the cost curve.[4] Attempting to compete with a superior power with still-inferior plans and equipment is to invest in failure. Alternatively, countries can consider many simple options. For example, thousands of commercial off-the-shelf sensors alerting a swarm of unmanned maritime and air assets, complemented by immediate control of the information domain to broadcast sovereign incursions, may be a more capable and credible choice. Such a response not only enables smaller forces to offset disadvantages in terms of conventional fires and manpower but also forces an adversary to reassess its risk tolerance.

Ukraine's resistance to Russian aggression is one such example of this concept. Ukraine has fought ferociously despite a significant disadvantage in conventional military hardware and manpower. It has stymied Russian advances by mitigating the imbalance through the creative use of unmanned systems, timely maneuvers, and information-related capabilities. The result has garnered historic levels of international aid to support its conventional and civilian resistance forces.[5] Ukraine's successful use of military and commercial off-the-shelf unmanned systems for surveillance and attack operations has regularly outpaced the decision-cycles and kill-webs of its more conventionally superior adversary.[6] This has repeatedly forced Russian forces to conclude their operations prematurely by avoiding direct confrontations until these imbalances are mitigated in a particular time and space of their choosing. This has happened on land and in the Black Sea, despite Ukraine not having its own navy.[7]

Amplifying the success of one's resistance while magnifying the injustices and failures of the adversary is just as critical as achieving those successes in the first place when competing with a superior adversary.[8] In this vein, Ukraine has employed cyber

warfare and information operations to counter Russia's narrative and invite considerable international support.[9] These Ukrainian successes demonstrate that asymmetric warfare effectively defends national sovereignty in the face of a conventionally superior opponent. As such, smaller countries have alternatives to accepting or slowly acquiescing to foreign encroachments or threats by reinforcing their advantages or focusing on methods that target an adversary's vulnerabilities.

Asymmetric Approaches Beyond the Battlefield to Avoid the Battlefield

The principles of asymmetric warfare are rooted in creativity, adaptability, and surprise and can extend beyond the battlefield. They can be readily applied to diplomacy and economics to challenge dominant players, achieve strategic objectives, and thrive in highly competitive environments.

The Cod Wars: Competing Below the Threshold of War

The Cod Wars of Iceland and Great Britain between the 1950s and 1970s are such a case of an asymmetric approach where direct conflict was best avoided. These conflicts highlight how a smaller country with limited military capabilities can use economic leverage and avoid direct military confrontation to achieve strategic goals against a superior adversary. Avoiding military confrontation was even more critical because Great Britain was still a significant trade partner for Iceland.[10]

Iceland's economy was heavily dependent on the fishing industry, and it sought to extend its exclusive fishing zone to protect its resources. With a much larger navy and economy, Great Britain opposed these moves. In response, Iceland used its coast guard to harass British fishing vessels and destroy fishing nets instead of attempting a military solution.[11] It did this by using mine-sweeping

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techniques to employ trawl-wire cutters to destroy fishing lines by sailing perpendicularly between fishing vessels and their towed nets. This action cost the British significant time for repair and substantial money in lost catches. As these activities continued and British costs climbed, the British were forced to recalculate the value of continued competition. Despite the Royal Navy's superiority, Iceland managed to secure its territorial waters and expand its fishing zone through these unexpected techniques in concert with pressure in other arenas.[12] This strategy allowed Iceland to avoid a conventional war while still achieving its objectives.[13]

Asymmetric Diplomacy

Iceland's conduct in the Cod Wars also provides a critical lesson on the use of asymmetric techniques in diplomacy by using a mix of legal frameworks, environmental narratives, and engagements with international organizations such as NATO.[14] This type of conflict—below the threshold of war—is particularly relevant today in areas like the South China Sea, where countries can employ a mix of diplomatic, informational, military, and economic tools to advance their interests without triggering open conflict between otherwise valuable trade partners.

Contemporarily, consider a small island country, already threatened by the effects of climate change, being exploited by a stronger country conducting illicit fishing and hydrocarbon

exploration in its exclusive economic zone. Lacking economic or military leverage, the country could use diplomatic strategies to inspire larger countries to enact carbon emission reduction policies that might complicate the stronger country's decision-making. By forming coalitions with similarly postured countries, partnering with non-governmental organizations, and using platforms like the United Nations to raise support, the smaller country could influence international environmental policies to protect its areas from foreign incursions. This approach mirrors the tactics of asymmetric warfare: identifying a competitor's weak points—in this case, international reputations and environmental accountability—and applying pressure in those areas to force action.

Smaller countries can also build strategic alliances and participate in multinational organizations to amplify their voices. Singapore, for example, leverages its strategic location and economic resources to serve as a hub for international diplomacy, mediation, and trade, notably by hosting the annual Asia Security Summit, also known as the Shangri-La Dialogue, and the first-ever United States–North Korea Summit in 2018. By offering themselves as neutral grounds for peace talks, smaller countries' voices are magnified at talks involving global conflicts elsewhere,

> *Smaller countries can also build strategic alliances and participate in multinational organizations to amplify their voices.*

such as the Ukraine Peace Summit held in Switzerland in June 2024.[15] This allows such countries to assert influence on the world stage far beyond their military or territorial capacities. Further, by directly engaging in dialogues concerning conflicts abroad, they indirectly express their positions on regional affairs without antagonization.[16] This approach mirrors asymmetric warfare by turning a perceived weakness (small size) into an advantage (out-sized influence in international affairs).

Asymmetric Economics

To keep pace with the current dynamics of geopolitics, one must recognize that competition to some is war to others. Seeing diplomacy and economics as separate from defense is like conducting military defensive operations without integrated fires and obstacles; it leads to the creation of a one-dimensional plan that an adversary can simply bypass using alternative avenues.

Economics must be integrated into national defense policies as much as diplomacy because security, economic stability, and foreign relationships are interdependent pillars of national power. When viewed as separate goals, they risk undermining each other, leading to inefficient use of resources and conflicting national objectives. For instance, a robust defense policy is unsustainable without a stable economy.[17] Further, strong defensive postures could signal aggression and threaten neighboring countries. A well-integrated approach enhances deterrence through complementary economic, diplomatic, and security efforts.[18] This ensures security measures do not destabilize economic growth or alienate allies.

> *By leveraging economic ties and diplomatic relationships, smaller countries can create a network of protection and influence, reducing the likelihood of isolation or military confrontation.*

This is particularly critical for smaller countries, where bold policies of defense, trade, and diplomacy can have an outsized impact on regional partners and competitors. Accordingly, an asymmetric approach is just as crucial to economics as it is to defense: a country with a substantial reliance on the capacity of others to sustain its economy is vulnerable to exploitation. Countries with limited capacity cannot directly match larger, more aggressive

powers without significant investments that threaten to affect the value of the other pillars. Therefore, that country must approach the market from an unexpected direction to thrive because economic resilience ensures countries can withstand sanctions or trade disruptions, just as shrewd diplomacy helps build alliances, secure foreign aid, and deter aggression through international support. Further, strong diplomatic and economic relationships can reduce the need for military intervention but only if backed by credible defense capabilities. By leveraging economic ties and diplomatic relationships, smaller countries can create a network of protection and influence, reducing the likelihood of isolation or military confrontation.[19] This multidimensional approach strengthens their security, allowing them to punch above their weight class in the geopolitical arena.

Japanese Automakers: Asymmetry Through Innovation

Post-World War II Japan is an example of how a small country can leverage its companies to maneuver around contested markets without directly competing against more established players. Japan focused on building their industries through protectionist policies and strategic investments, notably in the transportation sector, instead of competing directly with Western industrial giants. This strategy allowed them to develop a foothold in the domestic market to build the necessary capital and reputation before entering the international market.[20] It found an opening as an affordable, reliable, and fuel-efficient alternative to American automakers. Sales took off as the American elephants struggled to adapt to energy crises and higher emissions standards.[21] Over time, companies like Honda and Toyota became global leaders, outmaneuvering their Western competitors by focusing on quality, innovation, and efficiency. They have also disrupted their reputation as affordable economy cars by using motorsports for research and development. Their sustained success in Formula 1, motorcycle racing, and endurance racing

has introduced unique forms of engine management and hybrid technology into their passenger cars. The result has been unique approaches that address power and efficiency in unexpected ways— the hallmark of an asymmetric approach to a problem.

> *In this increasingly dynamic geopolitical landscape, an asymmetric approach can prove to be indispensable, providing not only military but also economic and diplomatic advantages.*

Conclusion

The principles of asymmetric warfare can extend beyond military applications to offer smaller countries a path to challenge and overcome more powerful countries in multiple domains. By identifying and exploiting openings in stronger competitors' markets, international relationships, and defense, smaller countries can leverage creative strategies that combine diplomacy, economics, and innovative technology to shift the balance of power in their favor. Historical examples such as the Cod Wars and contemporary cases like Ukraine's defense against Russia highlight the success of indirect approaches to achieve strategic objectives. Additionally, the lessons of Singapore have demonstrated that smaller countries can wield significant influence in the diplomatic arena through deft maneuvers that magnify their influence despite their small stature. In this increasingly dynamic geopolitical landscape, an asymmetric approach can prove to be indispensable, providing not only military but also economic and diplomatic advantages. As global competition continues to intensify, the lessons of asymmetric warfare remain crucial for countries seeking to safeguard their sovereignty and thrive as tigers amid larger, more conventionally powerful elephants.

About the Author

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Digital Influence Strategies in Information Warfare:
A Multimodal, Cross-Platform Comparative Analysis of Russia Today and China Global Television Network

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Introduction

Near-peer competitors like Russia and China have recognized the potential of social media as an asymmetric tool of influence in information warfare and a critical component of modern irregular warfare. Russia's state-affiliated global media outlets housed within RT (formerly Russia Today), which claim more than 10 billion YouTube views and 150 million monthly news network views, use coordinated account networks to amplify messaging and sow discord in target countries. China, which claims more than 150 million followers on CGTN (China Global Television Network) alone, strives to use Chinese state media to shape perceptions of China globally.

Recent multi-platform influence operations underscore the need for an urgent response. The Wagner Group, a Russian private military company, recently engaged in sophisticated disinformation campaigns across platforms like Facebook, YouTube, and Telegram. Leveraging paid influencers and bloggers, such efforts have been particularly active in shaping narratives, sowing discord, and advancing foreign geopolitical interests in Africa. Similarly, past reports highlight China's coordinated dissemination of propaganda and disinformation through state-controlled media outlets and networks of inauthentic accounts. The complex challenges that multi-platform influence operations pose warrant a nuanced understanding of how they are designed, executed, and countered.

A multi-level analysis of the digital strategies of RT and CGTN across multiple social media platforms helps provide understanding and counter near-peer competitors in the information domain. Examining five years of content across various platforms, languages, modalities, targeted audiences, and audience interactions reveals how these states leverage asymmetric options in digital influence campaigns. Understanding applications of emerging technologies is crucial for the contribution of the U.S. Special Operations Forces

(SOF) to win by exploring information warfare of near-peer competitors and developing effective counter-strategies against their strategic influence in the digital information space.

State of the Field

The impact of digital influence strategies has fundamentally altered the landscape of political communication and public discourse. Inside and outside the U.S., social media platforms have been linked to increased political polarization and the spread of misinformation. Scholars have argued that these platforms shape and change the topics of debates, make discourse more negative, spread disinformation, and define individuals and their reputations. Social media also polarize audiences, prime followers to expect certain topics, expand youth participation, and increase the nature and level of political activity. Central to these dynamics are the affordances of platforms—that is, material and social features that enable or constrain particular forms of use—which shape the nature of discourse, audience attraction, and interaction.

Numerous studies examine online influence on global media outlets, but most focus on single platforms or isolated events. Golovchenko et al., for example, analyze Russia's Twitter posts during the 2013–2014 Ukrainian conflict, while Huang and Wang examine China's strategic communication on Facebook. While insightful, such narrow foci fail to provide a holistic understanding of the interconnected nature of these influence operations. While each platform enables different forms of engagement through its unique affordances, few studies have examined how these differences play out across platforms in coordinated influence campaigns.

Recent research has begun to highlight the need for a more comprehensive approach to understanding influence on social media platforms. Lukito, for example, examines the coordinated disinformation campaign orchestrated by the Russian Internet

Research Agency across three major U.S. social media platforms—Facebook, Instagram, and X, formerly known as Twitter—to demonstrate the strategic leveraging of different platforms for specific purposes. Similarly, Bergh proposes a socio-technical framework spread across social networks to understand the political influences of information.

Previous propaganda and social media influence studies have also narrowly focused on single modalities. For instance, Alpermann and Malzer as well as Colley and Moore examine textual strategies on single platforms, while Tolz et al. and Makhortykh and Sydorova focus on visual content in specific contexts. These approaches fail to capture state actors' full multimodal strategies to attract attention; enhance information recall; aid believability; and change attitudes, beliefs, and behaviors. Collectively, studies of global media outlets, social media influence, and propaganda underscore the need to move beyond single-platform analyses and adopt a perspective that considers the contemporary interplay between platforms, content formations, and audiences.

Comparing sources, platforms, modalities, audience targeting, and audience interactions of RT and CGTN over an extended period addresses these knowledge gaps, and research discussed below offers insights into how platform affordances, audience targeting, and content modalities interact in the context of digital influence campaigns.

Methodology

Researchers analyzed 399,094 texts and 1,298 images from the RT and CGTN English and Arabic accounts on Facebook and Instagram posted between September 2018 and September 2023 (data supplied from Meta's public insight tool, CrowdTangle). They utilized BERTopic, an advanced natural language processing technique, to identify the most representative posts comprising the

281 top unique textual topics and 26 top visual topics. Chi-square analyses were employed to determine significant differences in topic emphasis across platforms, and languages and descriptive statistics to assess audience engagement levels were used.

Results

The presence of RT was greater on Instagram than CGTN, while CGTN was more active on Facebook. Posts related to topics varied by source, platform, modality, audience engagement, and target audience. On average, CGTN Facebook received more audience engagements, followed by RT Instagram, RT Facebook, and CGTN Instagram. Representative posts associated with each topic, a list of the top topics, and each of the study's chi-square results are available upon request.

Platform-Specific Textual Strategies

RT and CGTN employed distinct platform-specific, text-based strategies (see Table 3). RT Instagram emphasized Middle Eastern and Asian geopolitics in its texts, while RT Facebook posted about global issues. The RT Instagram account was significantly more likely to post texts about Afghanistan and the Taliban (p = .001) and food (p = .03). In contrast, its Facebook account posted more about electric vehicles (p = .003), Iranian politics and nuclear issues (p = .001), and space exploration (p = .001). CGTN Instagram featured positive images about Chinese technology and culture, while CGTN Facebook, particularly in the U.S., was more likely to post about controversial political issues. CGTN was significantly more likely to discuss space exploration (p = .004) and robotics and artificial intelligence (AI; p = .008) on Instagram, while concentrating on Iranian politics and nuclear issues (p < .001) on Facebook. Table 1 shows the top text-based topics on each platform.

Platform-Specific Visual Strategies

RT and CGTN also differed in their use of visual strategies (see Table 2). RT Instagram and RT Facebook visually emphasized the professional nature of their media platforms while focusing on global challenges. RT Instagram posted more images about global problems caused by the U.S. and its allies on Instagram ($p < .001$). It displayed more visual content related to live and breaking news on Facebook ($p = .007$). Positive images of China and its allies dominated the posts on CGTN Instagram. The Facebook posts highlighted images showing the strength of China and CGTN as a media outlet.

CGTN Instagram was more likely to post visual content related to

Table 1. Textual Content Posted by RT and CGTN on Facebook and Instagram between 2018 and 2023

Instagram RT			Facebook RT		
Topic	**Posts**	**%**	**Topic**	**Posts**	**%**
Chinese politics	1,538	5.3	Chinese politics	7,320	5
Israeli-Palestinian conflict	1,167	4	Israeli-Palestinian conflict	3,942	2.7
North African news	978	3.3	High-profile U.S. trials	2,277	1.6
Football	347	1.2	North African news	2,223	1.5
Turkish politics	288	1	Climate change	2,121	1.5
Instagram CGTN			**Facebook CGTN**		
Topic	**Posts**	**%**	**Topic**	**Posts**	**%**
Chinese politics	1,312	6.3	Chinese politics	15,915	7.8
Nature and wildlife	534	2.6	COVID-19	9,984	4.9
COVID-19	391	1.9	Hong Kong	3,403	1.7
Agricultural practices	249	1.2	Opinion pieces/author perspectives	2,281	1.1
School shootings	240	1.2	Climate change	2,173	1.1

Note: RT = Russia Today; CTGN = China Global Television Network.
Source: CrowdTangle provided original data for this analysis.

Chinese culture (*p* = .006). At the same time, CGTN Facebook was more likely to post images about local reporting around the world, events, and news posters (*p* = .001).

Average Audience Engagement and Textual Strategies

Audience engagement patterns with the textual topics of CGTN and RT were also distinct. Each platform had different topics associated with high post volume and high average levels of audience engagement (see Table 3). Those topics included COVID-19 for RT Instagram, high-profile U.S. trials for RT Facebook, nature and

Table 2. Visual Content Posted by RT and CGTN on Facebook and Instagram between 2018 and 2023

Instagram RT			Facebook RT		
Topic	**Posts**	**%**	**Topic**	**Posts**	**%**
Journalists	87	29.1	Local reporting around world	64	16
Global problems caused by U.S allies	27	9	Mixed	36	9
Money and corporations	26	8.7	Global leaders	27	6.8
Global leaders	24	8	Technologies	24	6
Trump movement	13	4.3	Live and breaking news	18	4.5
Instagram CGTN			Facebook CGTN		
Topic	**Posts**	**%**	**Topic**	**Posts**	**%**
Tourism	40	13.3	China, Hong Kong, Taiwan	26	8.7
Animals	28	9.3	Tourism	19	6.4
COVID-19, abortion, firearms in the U.S.	20	6.7	Mixed	19	6.4
China, Hong Kong, Taiwan	18	6	COVID-19, abortion, firearms in the U.S.	19	6.4
Chinese culture	16	5.3	Local reporting around world	19	6.4

Note: RT = Russia Today; CTGN = China Global Television Network.
Source: CrowdTangle provided original data for this analysis.

wildlife and pandas for CGTN Instagram, and nature and wildlife and Chinese politics for CGTN Facebook.

Average Audience Engagement and Visual Strategies

High average engagements with the top five visual topics occurred more often for Facebook than Instagram posts (see Table 4). The top visual topic prompting RT Facebook responses was fires/volcanoes, while the top topic for CGTN Facebook was animals. RT Facebook's audiences also interacted more with topics regarding media professionalism of RT, while CGTN Facebook audiences engaged more with visual topics on political issues. Disaster aftermath had the highest level of RT Instagram audience engagements, while for CGTN it was rescues/earthquakes. RT

Table 3. Average Audience Interactions to Textual Content Posted by RT and CGTN on Facebook and Instagram between 2018 and 2023

Instagram RT			Facebook RT		
Topic	**Posts**	**Average Interactions**	**Topic**	**Posts**	**Average Interactions**
Opinion pieces and author expectations	10	4,677	Nature and wildlife	308	5,918
Afghanistan & Taliban	122	3,095	Afghanistan & Taliban	381	1,270
U.S.-Ukraine relations	118	2,761	Wildfires	547	986
COVID-19	237	2,340	Hong Kong	334	876
Nature and wildlife	81	2,265	High-profile U.S. trials	2,277	857
Instagram CGTN			**Facebook CGTN**		
Topic	**Posts**	**Average Interactions**	**Topic**	**Posts**	**Average Interactions**
Hong Kong	74	1,150	Nature and wildlife	1,559	19,351
High-profile U.S. trials	6	950	Pandas	814	10,893
Nature and wildlife	534	931	Astronomy	306	7,110
Robotics and AI	84	917	Food	1,136	6,292
Pandas	212	871	Chinese politics	15,915	5,644

Note: RT = Russia Today; CTGN = China Global Television Network.
Source: CrowdTangle provided original data for this analysis.

Instagram's audience frequently interacted with political content; political topics on CGTN Instagram accounted for less than a third of the average engagement on the top 10 topics. Of those, only a small fraction focused on U.S.-centric issues, while a slightly larger share comprised China-related politics.

Language-Targeted Strategies

English/Arabic differences in Instagram posts. The RT English Instagram account posted texts more about robotics and AI (p = .001) and election dynamics and voter behavior (p = .006). In contrast, its Arabic account emphasized nutrition, diet, and diabetes (p < .001) and Turkish politics (p = .04). CGTN Instagram was more likely to post about U.S.-Ukraine relations (p = .004) and election dynamics and voter behaviors (p = .008) in its English account and about food (p = .001) and the U.S.-Mexico border crisis (p < .001) in

Table 4. Average Audience Interactions to Visual Content posted by RT and CGTN on Facebook and Instragram between 2018 and 2023

Instagram RT			Facebook RT		
Topic	Posts	Average Interactions	Topic	Posts	Average Interactions
Disasters and aftermath	2	6,382	Fires and volcanoes	4	30,474
COVID-19, abortion, firearms in the U.S.	4	3,110	Interviews with experts	13	4,086
Global problems caused by U.S./allies	27	2,689	Global problems caused by U.S./allies	7	1,512
Trump movement	13	2,576	Tourism	9	1,429
Protests and protest responses	12	1,883	Technologies	24	1,165
Instagram CGTN			Facebook CGTN		
Topic	Posts	Average Interactions	Topic	Posts	Average Interactions
Rescues and earthquakes	7	2,643	Animals	9	16,587
China, Hong Kong, Taiwan	18	958	Tourism	19	7,806
Animals	28	841	Mixed	19	4,686
Mixed	8	797	COVID-19, abortion, firearms in the U.S.	19	3,975

Note: RT = Russia Today; CTGN = China Global Television Network.
Source: CrowdTangle provided original data for this analysis.

its Arabic account. Table 5 shows the top textual topics on the RT and CGTN English and Arabic Instagram accounts.

English/Arabic differences in Instagram images. The RT English Instagram account displayed more images focused on global problems caused by the U.S. and its allies as well as journalists ($p = .01$; $p < .001$), while its Arabic Instagram account included more pictures showing global leaders ($p < .001$), money/corporations ($p < .001$), event and news posters ($p = .01$), and transportation ($p = .01$).

In the comparison, between the CGTN English and Arabic Instagram accounts, the Arabic account was more likely to display

Table 5. Top Textual Content Posted by RT and CGTN on Instagram English and Arabic Accounts Between 2018 and 2023

RT English			RT Arabic		
Topic	**Posts**	**%**	**Topic**	**Posts**	**%**
Chinese politics	406	3.73	Chinese politics	1132	6.16
Israeli-Palestinian conflict	269	2.47	North African news	964	5.25
Climate change	190	1.74	Israeli-Palestinian conflict	898	4.89
COVID-19	175	1.61	Football	327	1.78
Aviation	124	1.14	Turkish politics	216	1.18
CGTN English			**CGTN Arabic**		
Topic	**Posts**	**%**	**Topic**	**Posts**	**%**
Trump and Epstein	125	0.76	School shootings	9	0.21
U.S.-Mexico border crisis	112	0.68	Pollution and environment	9	0.21
Agricultural practices	102	0.62	Football	7	0.16
Pollution and environment	95	0.58	Astronomy	6	0.14
Election dynamics/voter behavior	90	0.55	Afghanistan and the Taliban	5	0.12

Note: RT = Russia Today; CTGN = China Global Television Network.
Source: CrowdTangle provided original data for this analysis.

images of tourism (p < .001), animals (p = .001), and natural landscapes and beauty (p = .006). In contrast, the English account did not exhibit any significantly relevant foci. Table 6 shows top visual topics on RT and CGTN Instagram's language accounts.

Table 6. Top Visual Content Posted by RT and CGTN on Instagram English and Arabic Accounts Between 2018 and 2023

RT English			RT Arabic		
Topic	Posts	%	Topic	Posts	%
Journalists	87	43.5	Money and corporations	26	26.3
Global problems caused by U.S./allies	27	13.5	Global leaders	21	21.2
Trump movement	13	6.5	Transportation	10	10.1
Protests and protest responses	12	6	Events and news posters	6	6.1
Mixed	7	3.5	Technologies	4	4
CGTN English			CGTN Arabic		
Topic	Posts	%	Topic	Posts	%
COVID-19, abortion, firearms in the U.S.	17	8.5	Tourism	26	26
Chinese culture	16	8	Animals	20	20
China, Hong Kong, Taiwan	16	8	Natural landscapes and beauty	10	10
Tourism	14	7	Rescues and earthquakes	3	3
Global problems caused by U.S./allies	13	6.5	Fires and volcanoes	3	3

Note: RT = Russia Today; CTGN = China Global Television Network.
Source: CrowdTangle provided original data for this analysis.

English/Arabic differences in Facebook posts. RT Facebook posted significantly more written posts about aviation (p = .001) and economic trends (p = .005) on its English Facebook account, while including more written posts about North African news on its Arabic account (p = .001).

CGTN Facebook's English account posted more written texts

Table 7. Top Textual Content Posted by RT and CGTN on Facebook English and Arabic Accounts Between 2018 and 2023

RT English			RT Arabic		
Topic	**Posts**	**%**	**Topic**	**Posts**	**%**
Chinese politics	3,439	4.228	Chinese politics	3,881	6.086
Israeli-Palestinian conflict	1,990	2.446	North African news	2,120	3.324
Climate change	1,904	2.341	Israeli-Palestinian conflict	1,952	3.061
High-profile U.S. trials	1,499	1.843	Space exploration	1,239	1.943
COVID-19	1,382	1.699	Nutrition, diet, and diabetes	1,093	1.714
CGTN English			**CGTN Arabic**		
Topic	**Posts**	**%**	**Topic**	**Posts**	**%**
Chinese politics	10,324	6.452	Chinese politics	5,591	12.698
COVID-19	7,564	4.727	COVID-19	2,420	5.496
Hong Kong	2,890	1.806	Agricultural practices	920	2.089
Opinion pieces and author perspectives	2,280	1.425	Israeli-Palestinian conflict	815	1.851
Climate change	2,090	1.306	Hong Kong	513	1.165

Note: RT = Russia Today; CTGN = China Global Television Network.
Source: CrowdTangle provided original data for this analysis.

about nuclear energy and treaties (p = .008), social media (p = .003), and nutrition, diet, and diabetes (p = .01), while its Arabic account posted more text related to agricultural practices and Chinese politics (p < 0.001; p < .001). Table 7 shows top textual topics on the RT and CGTN Facebook language accounts.

English/Arabic differences in Facebook images. RT Facebook displayed more visual images about local reporting about the world as well as live and breaking news on its English account (p < .01; p = .004), while posting more images about space technologies/aerial warfare, interviews with experts, and transportation on its Arabic account (p < .001; p = .03; p < .001).

Table 8. Top Visual Content Posted by RT and CGTN on Facebook English and Arabic Accounts Between 2018 and 2023

RT English				RT Arabic		
Topic	**Posts**	**%**		**Topic**	**Posts**	**%**
Local reporting around the world	63	31.5		Mixed	27	13.5
Live and breaking news	18	9		Disasters and aftermath	23	11.5
Protests and protest responses	13	6.5		Global leaders	17	8.5
News	12	6		Transportation	13	6.5
Questions	12	6		Interviews with experts	12	6
CGTN English				**CGTN Arabic**		
Topic	**Posts**	**%**		**Topic**	**Posts**	**%**
China, Hong Kong, Taiwan	20	10.1		Events and news posters	16	16
COVID-19, abortion, firearms in the U.S.	17	8.5		Tourism	8	8
Mixed	16	8		China, Hong Kong, Taiwan	6	6
Local reporting around the world	16	8		Animals	6	6
Tourism	11	5.5		Transportation	4	4

Note: RT = Russia Today; CTGN = China Global Television Network.
Source: CrowdTangle provided original data for this analysis.

Visually, CGTN Facebook placed more images of events and news posters on its Arabic account ($p < .001$), while its English account showed no unique significant focus. Table 8 shows top visual topics on the RT and CGTN Facebook language accounts.

Recommendations

RT and CGTN are tailoring their content strategies to different platforms, modalities, and target audiences, necessitating that SOF develop effective counterstrategies that involve the following:

- **Multi-Platform Analysis**. SOF should operate effectively across multiple social media platforms, recognizing and leveraging unique affordances.

- **Short-Term/Long-Term Perspective**. SOF should develop immediate responses and track how adversarial states reinforce messaging through repetition to develop a long-term message assessment and response framework.

- **Multimodal Messaging Approach**. SOF should recognize and implement the contributions of the various modalities in their counter-messaging, particularly with AI's expansion into the area.

- **Cross-Language Comparison**. The significant differences in content strategies across languages underscore the need for SOF to develop linguistically and culturally adaptive influence operations.

- **Audience Engagement Analysis**. SOF should develop sophisticated audience analysis capabilities, including online search tools, audience engagement, and correspondence to interest in traditional news items.

Conclusion

This research equips SOF with valuable insight into how near-peer competitors use digital platforms for influence operations. By adopting a multidimensional approach to digital influence, SOF can enhance its capabilities to prevent, prepare, prevail, and preserve against adversarial information campaigns. Future research should explore real-time analysis capabilities, cross-cultural topic modeling, more inclusive platform and language-based analyses, and the integration of audio content in influence strategies to further refine SOF's approach to information warfare in the digital age. Additionally, comparative, longitudinal studies tracking the evolution

of these strategies over time could provide valuable insights into the long-term trends and adaptations in state-sponsored digital influence campaigns.

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Navigating Between Two Giants: Leveraging Indonesia SOF Cooperation Between the U.S. SOF and the People's Republic of China SOF in the Era of Strategic Power Competition

By Captain Agung Dwi Pratama, S.S.T.Han., M.CT

As Lord Palmerston said, international relations can be a fluid situation; a country's loyalty and allegiance to others can change according to the country's national interest. Moreover, fluid international relations have become more dynamic due to the current strategic power competition based on the ambiguous situation between confrontation and cooperation. Consequently, a country can simultaneously be an ally and an adversary, whether or not those countries acknowledge or realize the situation. For instance, despite having diplomatic relations and bilateral cooperation, Indonesia and China have had several confrontations in the South China Sea, such as friction between the China Maritime Militia and Indonesian Navy patrol ships in the area. The situation between Indonesia and China is a clear example of how both countries can have similar interests in one issue but different interests in another.

One question is whether the current strategic competition increases the fluidity of international relations. And, if so, how a middle power country navigates its country's interests in this situation. Based on the fluidity and ambiguity of international relations, the current strategic power competition in the South China Sea is in the gray zone era. As Christopher Marsh defines it, a gray zone is a condition between war and peace, in which the competition among states remains below armed conflict.[1] However, Marsh also points out that there are two understandings of the concept of the gray zone: the West's point of view and China's. The West and its allies understand that a gray zone is an overlapping

reality between war and peace, which is always at the threshold below armed conflict. However, Western adversaries, such as the People's Republic of China (PRC), the Russian Federation, and others, see the gray zone as the pathway from peace to war.[2] Based on Western adversaries' understanding, the gray zone will eventually lead to war, whether it is a conventional war or an irregular war. Therefore, Indonesia should also prepare for escalation in the gray zone. Jakarta needs to realize and understand that Beijing will not always show its soft side and ambiguity; there will always be a possibility of armed conflict.

As a middle power country, Indonesia should be able to navigate the fluid and obscure conditions in the gray zone situation. Its national interests in the South China Sea are tied to the region's stability and maintenance of its national sovereignty over its territory. Meanwhile, the interest of the PRC is its desire for the South China Sea as its own territory, called the nine-dash line. Conversely, the interest of the U.S. is about the freedom of navigation operations (FONOPS).[3] There are some overlapping areas of interest that Indonesia can leverage to maintain the South China Sea's stability. Through the perspective of military cooperation, specifically Special Operations Forces (SOF) cooperation between Indonesia and the U.S. or between Indonesia SOF and China SOF, SOF cooperation can navigate the strategic power competition in Southeast Asia.

Indonesia SOF, as a middle-power SOF, can significantly balance strategic power competition. It should be able to navigate between the two great power interests—China's desire for Southeast Asia as its private backyard and U.S. FONOPS—to strengthen Indonesia's interest in regional stability. Each country's interest (Indonesia, the U.S., and the PRC) can be balanced in SOF cooperation amongst these nations. Two types of SOF joint training cooperation should be conducted. Indonesia SOF and China should mostly focus on the surgical-strike type of cooperation, such as counterterrorism

> *The scale of complexity in strategic power competition covers a range of aspects of diplomacy, information, military, and economy. SOF cooperation can not only play a primary and significant role in strategic power competition but also can also contribute to more complex aspects of it.*

(CT) and counterpiracy. On the other hand, Indonesia SOF and U.S. SOF should explore more maritime irregular warfare (IW), specifically the unconventional warfare (UW) types of cooperation or resistance operations concepts of cooperation.

The interests of major powers like the PRC and the U.S. are reflected in the current global situation. By exploring the middle-power theory and Indonesia's "free and active" foreign policy, the focus can shift to how to support middle-power interests amid strategic power competition. Security cooperation (SC) frameworks and collaboration between Indonesia, the U.S., and the PRC can help balance the influence of great powers and influence ongoing strategic rivalry. However, the scale of complexity in strategic power competition covers a range of aspects of diplomacy, information, military, and economy. SOF cooperation can not only can play a primary significant role in strategic power competition but can also contribute to more complex aspects of it.

Middle-Power Pragmatism and Indonesia's Free and Active Policy

Defining a middle power is necessary prior to exploring SOF's roles in strategic competition. According to Robert Cox, a middle power is a state with significant but not dominant influence positioned between a great power and a small state. Cox introduces the concept of middlepowermanship, which refers to the diplomatic

and strategic role that a middle power can play in international relations. He also acknowledges the limitation of a middle power is its dependence on a great power for security. Thus, according to Cox, a middle power's vulnerability lies in its security needs, which pose the risk of being placed at the center of a power grab.[4]

Other scholars, such as Cranford Pratt, argue that a middle power is characterized by its multilateralist approach to addressing global poverty. Pratt also introduced the concept of *progressive internationalism* and *pragmatic internationalism*. Progressive internationalism is driven by the greater good of norms, meaning a middle-power country should promote international cooperation based on the global problem. Alternatively, pragmatic internationalism is about aligning national interests with the great power in the interest of multinational cooperation.[5]

Despite Pratt's suggestion that middle-power countries should promote more progressive internationalism, Cox's middlepowermanship theory points out the limitation of a middle power, which is the security concern. Thus, pragmatic internationalism is the logical choice for a middle-power country like Indonesia, which must find common ground in the South China Sea strategic competition environment. The alignment in SC between Indonesia, the PRC, and the U.S. could contribute to regional stability.

Indonesia's pragmatic approach to international relations is translated into its foreign policy. Indonesia's free and active foreign policy is driven by Cold War polarization ramifications in the international environment. The rise of the middle-power countries was seen in April 2019 during the Bandung Conference in Indonesia. The conference gathered 29 nations from emerging powers in Asia and Africa.[6] The movement was the result of the willingness of middle-power countries to prevent the further impact of the Cold War, and some of the ramifications created domestic turmoil in the

> *The alignment in the security cooperation between Indonesia, the PRC, and the U.S. could contribute to regional stability.*

middle-power countries. The free and active foreign policy is not a non-alignment policy or disengagement from the international community; it is more about Indonesia's effort to balance strategic power competition by maintaining cooperation between two competing countries.[7] Thus, according to free and active foreign policy, one could argue that Indonesia should be able to maintain SC (in this case, military) with the PRC and the U.S. to promote Indonesia's national and regional interests.

The challenge to Indonesia's middle-power, free and active approach is avoiding the entrapment of the U.S. or the PRC.[8] For a limited middle-power country, the goal is to find a way to avoid this condition. A pessimistic, yet beneficial, view, as Marsh mentions in "Maskirovka and the Grey Zone," is the assumption that the gray zone would stop the short war is flawed. In other words, one should and must prepare for conflict rather than assume there will be no escalation. By accepting this reality, Indonesia can better prepare itself by absorbing all the benefits of military cooperation from the U.S. and the PRC.

Cooperation would help slow the road to armed conflict in the South China Sea by promoting inclusive cooperation for regional stability. However, Indonesia cannot navigate the tricky South China Sea environment by leaving its allies, the Association of Southeast Asian Nations (ASEAN). Indonesia's effort to navigate the South China Sea should be seen as leading by example for its ASEAN partners. This effort was practiced in 1955 during the Bandung Conference when the middle countries tried to rattle two great-power countries during the Cold War.

The Great Powers' Desire in the South China Sea

The PRC and the U.S. have their own version of each nation's interests in the South China Sea. The hegemony needs power, and for the PRC, one of its sources of power comes from the sea. The power from the sea results from maritime commerce. The maritime environment in the South China Sea is crucial to the ambition of the PRC to become a great power player. South China contributes 40 percent of trade—and 80 percent of oil (energy) comes from seaborne transportation.[9] The South China Sea is an economic resource for the PRC, which can provide food and a source of income to its people. The sea becomes an economic resource for the nation and creates domestic stability in the PRC, which is crucial for fulfilling the ambition to become a hegemon. Hence, controlling the South China Sea is crucial to China's ambition for global hegemony. This ambition creates a conflict of interest between the PRC and the Southeast Asian nations. Thus, the ambition of the PRC will also create a threat to the PRC itself.
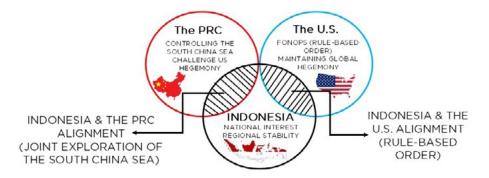
However, as Toshi Yoshihara states in his book *Red Star Over the Pacific,* the PRC under President Xi Jinping acknowledges that its assertive claim toward the South China Sea could impact the regional tension in the South China Sea nations, and the PRC should avoid this possibility of conflict escalation.[10] Therefore, China's dilemma in its will to privatize the South China Sea and its willingness to avoid escalation of conflict is Indonesia's opportunity to assert its middle-power interests.

The assumption behind Xi's willingness to avoid conflict escalation is that Beijing still operates from the West's point of view of the gray zone. Beijing's avoid-escalation policy becomes an opportunity for Indonesia to cooperate and prepare for conflict escalation. Cooperation in the South China Sea can be conducted as a joint venture of the South China Sea based on Indonesia's

national interest and regional stability. This does not mean Indonesia acknowledges China's claim to the South China Sea.

As both Cox and Pratt point out, the limitation of a middle power is the necessity of support from a great power, especially in the security area. To balance China's claims in the South China Sea is to embrace the U.S. point of view of the South China Sea. The support from the U.S. should not compromise Indonesia's national or regional interests. Instead, it should create a two-way message for the U.S. and the PRC that Indonesia has its own voice in the South China Sea region.

The U.S. interest in the South China Sea is similar to that of the PRC, which is to secure the trade routes and hydrocarbon resources.[11] The U.S. upholds FONOPS and the rule-based order of the South China Sea.

Figure 1. A Venn diagram showing the author's interpretation of overlapping strategic power interest in the South China Sea. Source: Author

Consequently, as Figure 1 shows, Indonesia is between two competing great powers in the South China Sea. Thus, the role of Indonesia as the middle power in the South China Sea is to maintain the ability of Indonesia's national interest to conduct sea exploration in the South China Sea with the PRC and other nations. Simultaneously, the rule-based order of maritime exploration in the South China Sea should be promoted based on cooperation with the

U.S. and other partner nations. Based on these conditions, Indonesia SOF will operate in joint exploration with China and, with the U.S., promote the rule-based order. This cooperation aims to raise and implement Indonesia's voice and interest in the region and hopes to de-escalate or slow the gray zone from turning into a war zone.

SOF Roles in the South China Sea: Strategic Power Competition

For Indonesia to balance the South China Sea competition, it will need a more comprehensive approach from other government agencies. SOF can play critical roles in the strategic power competition because they are able to adapt and operate in various domains, such as the gray zone.[12] Indonesia SOF employment should create a clear message about Indonesia's capability to conduct IW in the region, which can create stability or instability.

The primary purpose of cooperation with the U.S. and the PRC is to create a dilemma for both nations so Indonesia can uphold its own interest in the region. On one hand, Indonesia SOF's cooperation with the PRC shows the ability of both SOF to create a secure environment for Beijing commerce to conduct maritime sailing through counterpiracy and CT exercises.

On the other hand, to promote rule-based order, Indonesia SOF needs to send a clear message to PRC SOF about their ability to conduct maritime IW and UW alongside U.S. SOF (working with all elements in Indonesia's maritime region) to create stable or unstable operations.

SOF application is best understood by exploring the types and theoretical functions of Indonesian, PRC, and U.S. SOF. In their chapter on the value of theory, Marsh et al. use definitions from the U.S. Army Special Operations Command's point of view to explain special operations. According to them, special operations comprise

two types of operations: surgical strike, such as direct action (DA) or lethal power, and special warfare, which is a combination of lethal and non-lethal power.[13]

While Indonesia has several types of SOF, the Indonesian Army SOF is the primary and oldest SOF unit in the Indonesian National Armed Forces. Komando Pasukan Khusus (Kopassus) is the Indonesian Army special forces command, modeled after the 1st U.S. Special Forces Command (Airborne). Kopassus is composed of one special forces headquarters, a training and education command, two UW groups (2nd and 3rd Group), one airborne commando group (1st Group)—which has a similar function to the 75th Ranger Regiment— and one CT element (Satuan 81 Kopassus/81 Unit of Special Forces).[14] Like its U.S. counterpart, Kopassus has two types of special operations: surgical strike and special warfare. Kopassus has experienced various military campaigns, from unconventional warfare to hostage rescue operations in the Somali Sea.[15]

On the other hand, PRC SOF has a wide range of SOF from each service branch to the armed police. Nonetheless, despite the experiences of the PRC in protracted warfare, PRC SOF roles focus more on surgical-strike types of operations.[16] PRC SOF's role is primarily to perform short-range operations and DA and to support the large-scale combat operations of the PRC.[17]

Indonesia SOF and the People's Republic of China SOF Joint Cooperation

The cooperation of Indonesia and the PRC started in 2014 with the CT exercise code-named Sharp Knife. The cooperation stopped in 2015 due to the North Natuna Sea (Indonesia's version of the South China Sea) dispute between Indonesia and the PRC. Subsequently, under the President of Indonesia in 2024, Indonesia and the PRC discussed resuming military exercises.[18] The resumption of Indonesia and the PRC cooperation allows Indonesia SOF to

Members of 1st Special Forces Group (Airborne) and the Indonesian Special Forces (Kopassus) conduct a successful HALO military freefall rehearsal during Garuda Shield '22 near Baturaja, Indonesia, August 2, 2022. U.S. Army photo by Staff Sergeant Matthew Crane.

explore joint interests between the two countries in the South China Sea. As both countries have the capability for surgical strike-type operations, CT and counterpiracy can benefit from this joint interest, and the joint exercise aims to promote regional security to support the maritime ventures in the South China Sea.

As with any other joint exercise, it also sends a message to non-state actors (e.g., pirate groups, terrorist groups) in the region that the two countries commit to safeguarding the South China Sea region. However, this does not mean Indonesia accepts the nine-dash line as normal. The cooperation between Indonesia and the PRC aligns with both China's and Indonesia's national interests.

Indonesia SOF and U.S. SOF Cooperation

To balance Indonesia SOF and PRC SOF cooperation focused on the South China Sea, cooperation between Indonesia SOF and the U.S. SOF must focus on special warfare operations.

While Indonesia and the PRC resumed their cooperation in 2024, the normalization of Kopassus and U.S. Special Forces started in

Indonesia SOF and the PRC SOF are shown during 2024 Garuda-Heping Joint Exercise in Indonesia. Source: *People's Liberation Army Daily*, "China-Indonesia 'Peace Condor-2024' Joint Exercise Launched a Disaster Rescue Exercise," Xinhua News Agency, June 12, 2024.

2018 and continue. Previously, joint exercises between Kopassus and Special Forces began in 1996 under the JCET.[19]

Kopassus and U.S. Special Forces have capability in special warfare, specifically in UW. While operating in the gray zone, UW cooperation aims to increase Indonesia's ability to conduct resistance operations and mobilize forces that combine SOF non-kinetic and kinetic elements. Alternatively, it could be argued that Indonesian and U.S. SOF cooperation is about maritime IW, the purpose of which is to shape the maritime environment of anti-access, increase capacity building, and project U.S. forces ashore.[20]

The focus of maritime IW cooperation will balance Indonesia SOF cooperation in CT and counterpiracy with the PRC SOF. Indonesia SOF will promote both joint ventures and maintain rule-based order. Maritime IW cooperation also serves as a balancing message to the PRC that Indonesia SOF is capable of unconventional warfare and is prepared to mobilize all kinetic and non-kinetic elements to safeguard Indonesia's national interest and regional stability.

Conclusion

As the middle-power country trapped in the power-grabbing competition between the PRC and the U.S., Indonesia must be able to assert its national interest and regional stability to avoid deteriorating the situation in the South China Sea. Therefore, Indonesia needs cooperation between the PRC and the U.S. to prevent the gray zone from moving into armed conflict. The PRC and the U.S. have their own South China Sea aspirations. The PRC is eager to control the South China Sea for logistical reasons—trade and energy—but it also wants to avoid conflict with the Southeast Asian nations, while the U.S. is focused on FONOPS and maintaining global hegemony.

Within the PRC in its quest for power and the U.S. willingness of to maintain the rule-based order in the South China Sea is an opportunity for Indonesia to promote its national interest and regional stability. From a SOF perspective, Indonesia and the commitment of the PRC to SOF cooperation in CT and counterpiracy embody commitment in the South China Sea joint venture.

On the other hand, maritime IW joint cooperation between Kopassus and U.S. Special Forces will amplify the idea that Indonesia is willing to mobilize kinetic and non-kinetic elements to increase national resilience in preparing resistance operations on Natuna Island and in the North Natuna Sea. Nonetheless, SOF cooperation is just one element in the complex gray zone competition. To maintain regional stability, Indonesia needs to mobilize all national instruments such as diplomacy, information, and the economy and cooperate with other Southeast Asian countries.

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Maximizing SOF Strategic Deterrence in the Indo-Pacific

By Lieutenant Commander
Jordan A. Spector

U.S. Special Operations Command (USSOCOM) is a strategic deterrent. The roughly 6,000 service members across 80 countries build global deterrence through targeted operations, expansive partnerships, service to the joint force, and a general omnipresent threat.[1] The ability for Special Operations Forces (SOF) to leverage strategic weak points, tactical adaptability, and operational dynamism allows for outsized and unforeseen effects that every potential aggressor must consider prior to and during conflict. Recent examples like Ukraine's asymmetric operations against Russian infrastructure have reemphasized how effective such capabilities can be, even against major powers.[2] However, even as these examples circulate through the daily briefings of world leaders, their deterrent effects can become lost within larger geopolitical movements and further disconnected through individual foreign policy agendas. This is especially pronounced in the intensifying U.S.-China competition, where every capability must fight for strategic attention.

Yet if this is the "decisive decade" that will shape the prospects for war, all services and unified commands must seek to maximize their deterrence value.[3] For USSOCOM, this entails both continuing to support joint force and allied capabilities but also expanding its own unilateral deterrent role to effectively reach People's Republic of China (PRC) leadership. Yet this vector presents a challenge for SOF. Deterrence at the level of global leaders requires a message that not only penetrates through "'the din and noise of world politics" but one that can be sustained and clearly understood by an opposing nation's decision-makers.[4] While nuclear and conventional forces project persistent deterrent value through visible capabilities or known consequences, SOF traditionally emphasize neither. Yet SOF's inherent adaptability positions it uniquely to expand deterrent roles while maintaining irregular warfare operational effectiveness. This is more than a selective revelation of capabilities—the task requires major effort realignment. To achieve deterrence, USSOCOM

> *SOF's inherent adaptability positions it uniquely to expand deterrent roles while maintaining irregular warfare operational effectiveness.*

and Indo-Pacific SOF equities should develop a PRC-deterrent mandate to align focus and forces with three strategic objectives: (1) identify specific SOF-sensitive targets critical to Chinese-Taiwan invasion requirements, (2) scale SOF capabilities to impact these targets, and (3) signal these threats credibly to Beijing's leadership.

The Overarching Deterrence Dilemma

Modern deterrence theory is nuclear in origin. Though it incorporates concepts for limiting conflict broadly, it is fundamentally focused on preventing nuclear war. For this reason, "deterrent" or "strategic" forces were almost exclusively those related to nuclear weapons throughout the Cold War.[5] Deterrence was achieved through capability, credibility, and communication of the nuclear triad.[6] A capacity to effect mass destruction was made credible by a vast nuclear arsenal and communicated through disclosed force size, capabilities, and exercises. This legacy continues today.

However, nuclear deterrence is, by nature, extreme. Questions can arise about the willingness of any nation to resort to such destructive, potentially irreversible measures. For example, Russian nuclear threats have played a role in limiting Western intervention in the war in Ukraine,[7] but the nuclear red lines drawn by Vladimir Putin, repeatedly crossed and then redrawn, show the challenges of leveraging nuclear deterrence across the spectrum of conflict.[8]

In contrast, conventional deterrence relies on non-nuclear forces to deliver a credible threat across a broader range of scenarios. Factors such as overall force size, firepower, technological

superiority, and reputation generally play the most substantial roles. The visible deployment of carrier strike groups, demonstration of precision strike, and the performance of large-scale military exercises all communicate conventional deterrence to potential adversaries. Yet even massive conventional forces can fail to provide a credible deterrent if their outcomes are ambiguous or if adversaries question the political willpower to exercise them.[9]

Special Operations and Deterrence

SOF face an even more complex deterrence challenge. Unlike nuclear forces that derive deterrent value from known destructive capacity, or conventional forces that project power through visible capabilities and demonstrated effects, SOF operations have historically been powerful because of their unknowability. The very characteristics that make SOF so effective in conflict—secrecy, surprise, and adaptability—work against the transparency and clarity that deterrence demands before war begins.

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This does not mean SOF are not a deterrent force. Deterrent pressure is exerted through several mechanisms. First, SOF are a joint force multiplier. Whether by intelligence collection that enables more effective targeting or by increasing the overall appraisal of U.S. forces, SOF enhance how adversaries view potential U.S. response. Second, SOF's global partner capacity building and relationships make aggression more costly by strengthening an adversary's

opponents. Third, well-known SOF operations showcase its global reach and rapid response capabilities. Fourth, recent examples also illustrate how quickly SOF can enable asymmetric resistance that complicates conventional military operations. Last, and perhaps most significantly, SOF create "strategic uncertainty"—adversaries cannot definitively know what capabilities exist, where they are positioned, or how they might be employed. This is an exceptionally important deterrent against China, which has long observed the power information and decision dominance, and rightly fears the capabilities of, the U.S. in these arenas.[10]

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However, these SOF deterrent effects suffer from limitations that reduce their strategic impact. Their influence operates at insufficient scale and frequency to shape high-level decision-making consistently. The general nature of SOF deterrent pressure makes it easier for adversary leadership to normalize and eventually ignore these concerns. General uncertainty about unspecified capabilities creates general concern—but such broad apprehension lacks the precision and immediacy that drives strategic decision-making. When Chinese Communist Party (CCP) leadership evaluates Taiwan options, vague SOF threats almost certainly blend into background noise rather than presenting specific, calculable risks to critical objectives.

This generalization problem is compounded by the little known or publicized extent and magnitude of SOF operations. Presidentially recognized major operations, disclosure of unclassified operations,

and those classified operations the adversary knows about might serve as acute markers that break through the static but then quickly recede. Exercises with partners offer similar spikes. True partner capacity building is slower to mature, and though force size and readiness levels are likely weighed more heavily, even this effect also suffers from the failure of vagueness.

As Thomas Schelling writes in his seminal volume on deterrence, "If the target of the attack is not vitally important to the deterring state, it will seldom be capable of broadcasting unambiguous deterrent threats in peacetime."[11] This point poses a question for SOF's deterrent potential: Can forces generally designed for invisibility project visible deterrent effects during peace that influence adversary decision-making to avoid war?

The answer is yes, but it requires USSOCOM to expand and adapt in three operational areas to increase its deterrent effects. First, specificity—identify SOF-sensitive targets critical to Chinese objectives and build plans to direct threats against these vulnerabilities. Second, scale and persistency—ensure SOF capabilities reach sufficient quantity or magnitude to impact these targets with strategic significance. Ensure these capabilities can be repeated and sustained. Third, signaling—the most dramatic change to SOF's current approach—communicate these threats credibly to Beijing's leadership without compromising broader unconventional warfare effectiveness.

A Case Study in SOF Deterrence

To illustrate how the principles of specificity, scale, and signaling can enhance SOF's deterrent value, consider how USSOCOM might publicly target China's maritime domain awareness (MDA) networks—vital components of Beijing's anti-access/area denial strategy to maintain regional control and limit possible intervention.

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Background: China's ability to defend its assets during a complex amphibious operation against Taiwan depends heavily on its increasingly robust MDA network. Over the past decade, the People's Liberation Army Navy (PLAN) has invested in artificial island development, linked-island and sea-based over-the-horizon radar systems, satellite surveillance networks, and seabed sensor arrays to create comprehensive awareness in the Taiwan Strait and surrounding waters.[12] These systems are intended to provide high-fidelity target data on submarines, warships, aircraft, and missiles, feeding that information to China's long-range anti-ship and anti-air systems. In a conflict, these interconnected nodes would theoretically create exclusion zones to prevent U.S. forces from entering effective weapons engagement zones (WEZ) to protect Taiwan.

Specificity: The disaggregate and isolated placement of the nodes in this network represent ideal opportunities for SOF targeting. Many of these will also be hardened against conventional strike options, which both impacts ordnance requirements to ensure a successful strike and creates reciprocal targeting problems for conventional fleet or air assets. Unlike coastal infrastructure, which China can more easily reinforce and defend, the variety, quantity, and remoteness of this MDA infrastructure make it nearly impossible to defend comprehensively. These are precisely the kind of high-value targets where SOF excels. In a conflict, SOF's rapid deployment or even pre-deployed posture could allow the U.S. to neutralize these systems ahead of conventional forces. Fleet and air platforms could then enter optimal WEZ (still generally considered superior to

China's) to disable significant PLAN combatants, disrupting the flow of PLAN forces needed for an invasion or blockade.[13]

Scale: For maximum effect in degrading China's multi-modal MDA network, SOF must be able to disable multiple nodes simultaneously. In practice, this means coordinating air, subsea, surface, and even space assets to target dozens of nodes spread across the first and second island chains. These targets must be struck decisively and concurrently to overwhelm China's built-in redundancies and open targeting opportunities for the joint force.

> *For maximum effect in degrading China's multi-modal MDA network, SOF must be able to disable multiple nodes simultaneously.*

The manner of disablement is also important for deterrence. Demonstrating a "kill" with a cyber weapon can be more challenging to present to an adversary yet also represents an area of fear that could be exploited. With the cyber battlespace still in its infancy, the role it might play in great power competition is recognized as important but difficult to demonstrate and quantify.[14] This makes it inherently weaker as a deterrent tool. It cannot be dismissed, but kinetic disablement and destruction generally offer better deterrent value.

Signaling: The final challenge in enhancing SOF deterrence is to effectively signal the threat clearly to Chinese decision-makers. In the MDA example, the message is simple: Invade Taiwan and you will be blinded. Once blind, coalition forces can act at their discretion.

Effective signaling might come in the form of a large, publicly advertised demonstration. This could occur during an international

exercise where visible media elements already exist. In the Indo-Pacific, the annual Rim of the Pacific (RIMPAC) exercise could provide an ideal venue. SOF operations could be developed within preplanned SINKEXs—operations where ships and sea-based infrastructure are intentionally sunk—or with land-based demolition demonstrations on targets that look like their PRC analogs.[15]

For deterrence to function, capabilities must not only be threatened but also believed. President Truman warned Japanese leaders of impending "prompt and utter destruction" before dropping the atomic bomb on Hiroshima in 1945.[16] They did not believe the warning. In deterrence, evidence is the foundation of credibility.

China monitors the U.S.'s major naval exercises extremely closely,[17] and this presents an opportunity to more impactfully adjust their calculus.[18] The goal is not to broadcast classified capabilities but to ensure that high-level Chinese military planners and political leaders understand the magnitude of SOF's threat. CCP leaders must believe the risk serious enough to weigh it alongside the other major deterrent efforts in assessing their own tolerance for war.

> *For deterrence to function, capabilities must not only be threatened but also believed.*

Vicious Diplomacy

SOF are already serving a deterrent role against the PRC and state and non-state actors across the globe. In 2024, Admiral Samuel Paparo, Commander of U.S. Indo-Pacific Command (INDOPACOM) commented on the importance of SOF's role in deterrence at the Irregular Warfare Symposium, citing "SOF's greatest power is early leverage" in deterring conflict.[19] Maximizing that early leverage requires more than serving as joint force enablers and multipliers,

> *To be effective preceding conflict, the key is moving from secret targeting to an external threat, scaling that threat to strategic significance, and effectively communicating it to the adversary.*

readiness for undisclosed decisive action in conflict, or building and amplifying our allies and partners. These must be maintained, but the adversary must also fear the direct effects that SOF can have on specific plans. This is the most powerful method of deterrence, and it must be specifically demonstrated, communicated, and sustained.

Crippling China's MDA network could be one such avenue. Without that network, the PRC knows that U.S. targeting and weapons range superiority will shift engagement advantage definitively away from its forces. Similar approaches could be applied to other critical vulnerabilities, from maritime militia degradation to port infrastructure sabotage and command network defeat. Plans may already exist to defeat each of these, but if those plans remain opaque they have little deterrence value to the Chinese. A PRC-deterrent mandate could bin and select which effects should remain hidden and which to grow and display. These could then be presented as options to INDOPACOM commanders and senior policymakers. To be effective preceding conflict, the key is moving from secret targeting to an external threat, scaling that threat to strategic significance, and effectively communicating it to the adversary.

It is important to remember that war with China is "neither imminent nor inevitable."[20] But the time to enhance deterrence and ensure war does not emerge is *now*, before crisis dynamics limit options and raise stakes. By developing, demonstrating, and communicating capabilities that directly threaten critical components of China's Taiwan invasion planning, USSOCOM can make a meaningful contribution to the "vicious diplomacy" of deterrence, and in doing so, help keep the peace.[21]

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TRANSFORM

BACKGROUND: As trailblazers for the Nation and stewards of precious resources, SOF must optimize, modernize, innovate, invent, and transform for current and future mission success.

FOCUS: Technological change and the changing character of war and SOF.

QUESTION: How can SOF leverage emergent technology and/or advanced concepts that enable SOF operations, such as the SOF-space-cyber-STRATCOM nexus, to prevent, prepare, prevail, and preserve in conflict against a near-peer competitor (e.g., Russia/PRC)?

Developing a Theater Special Operations Cyber Element

By Commander Karlie Blake, Lieutenant Colonel Jonathan Zannis, and Major Shawn Gutierrez

Introduction

The evolving nature of warfare demands that U.S. Special Operations Forces (SOF) adapt beyond their traditional kinetic roles to fully integrate cyber capabilities into their operations to counter emerging cyber threats from state and non-state actors. Establishing an organic theater special operations cyber element (SOCE) within the U.S. Special Operations Command (USSOCOM) to integrate cyber warfare into special operations ensures dominance on the physical and digital battlefields.

By examining the case studies of Russia's long-standing military information support operations (MISO) campaign against Ukraine and cyber warfare tactics during the 2008 Georgia conflict, it can be seen how adversaries have effectively leveraged cyber operations to shape the operational environment before conventional military engagement. Additionally, the legal frameworks of U.S. Code (USC) Title 10 and Title 50 authorities, as well as command and control (C2) structural challenges, shape the ability of USSOCOM to establish a SOCE and influence the evolution of SOF-cyber operations. By embedding highly skilled cyber operators within SOF units, theater special operation commands (TSOCs) will have dedicated cyberspace operations forces at their disposal, allowing the theater commands to determine the timing and tempo of cyber operations tailored to their specific SOF mission requirements. As adversaries such as Russia, China, Iran, and North Korea continue to refine their cyber warfare capabilities, failure to act now risks ceding a strategic competitive advantage to hostile state and non-state actors. To maintain dominance in modern conflict, USSOCOM must act decisively by securing funding, personnel, and institutional backing for the formal establishment of the SOCE. This initiative will ensure that SOF remains at the forefront of multi-domain warfare, capable of executing SOF-cyber missions with speed, precision, and strategic impact.

Developing a Theater Special Operations Cyber Element

For the past 25 years, U.S. SOF have remained committed to their core activities under Title 10, Section 167 authorities. Examples include direct action (DA), special reconnaissance (SR), unconventional warfare (UW), foreign internal defense (FID), and counterterrorism (CT). However, the nature of warfare is evolving, as demonstrated by recent conflicts in Russia and Ukraine, as well as the broader shift toward great power competition. To compete and prevail in modern conflicts, SOF must develop an organic, theater-level cyber force. The speed and complexity of contemporary warfare demand a seamless integration of cyber capabilities within SOF, thereby forging a force capable of executing rapid, decisive actions at the time and place of need.

Neglecting to integrate cyber capabilities into SOF operations will critically undermine U.S. forces, leaving them vulnerable to adversaries who have already mastered the use of cyber warfare as a strategic weapon.

Neglecting to integrate cyber capabilities into SOF operations critically undermines U.S. forces, leaving them vulnerable to adversaries who have already mastered the use of cyber warfare as a strategic weapon. Establishing dedicated and tailored SOCEs across the enterprise at the theater level would mark a significant shift in military strategic priorities. This approach would foster a more comprehensive and integrated method for training and operational planning, ensuring that cyber operations are seamlessly incorporated into the broader strategic framework of special operations. Fundamentally, this would enhance the effectiveness and cohesion of SOF, enabling them to address emerging threats

with agility and precision.

While SOF have traditionally focused on physical operations, the evolving nature of warfare necessitates an expansion into the virtual battlespace. For example, Russia successfully integrated cyber tactics into unconventional and conventional operations, specifically during its long-standing, cyber-enabled MISO campaign against Ukraine. Similarly, Russia used cyberattacks during the 2008 conflict in Georgia, where cyber operations were deliberately used to shape the operational environment ahead of deploying SOF into the country. The recent changes in U.S. Department of Defense (DoD) cyber policy and the structural challenges USSOCOM must overcome to fully incorporate cyber capabilities into special operations require strategic solutions to advance SOCE development, enable SOF to control the pace and execution of cyber operations, and effectively integrate cyber capabilities to support their distinct mission objectives.

Russia's Use of Cyberspace

James Wirtz astutely notes that "Russia, more than any other nascent actor on the cyber stage, seems to have devised a way to integrate cyber warfare into a grand strategy capable of achieving political objectives."[1] A striking example of this is Russia's long-running MISO campaign, which began in 2007 and played a pivotal role in mobilizing Russian separatists in Ukraine. By leveraging cyber tactics, Russia executed a sophisticated disinformation campaign designed to deepen divisions between ethnic Russians and Ukrainian nationalists. Through a strategic blend of virtual MISO, including social media manipulation and state-controlled media, Russia effectively shaped public perception and fueled unrest, demonstrating the powerful synergy between cyber warfare and psychological operations.
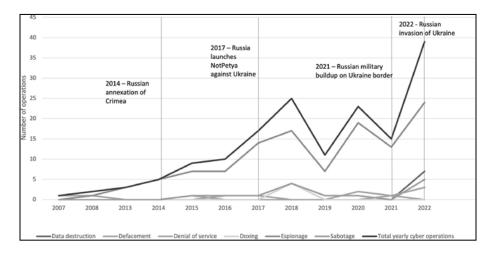
This campaign's cyber operations were relentless and highly

sophisticated. Hackers and criminal organizations engaged in sock-puppeting, creating fake online personas to manipulate public opinion by amplifying support for and opposition to key figures and ideas. This manufactured discourse fueled an echo chamber effect across social media, reinforcing polarization. Cloned websites and fabricated accounts rapidly spread disinformation, while AI-powered bot farms hijacked trending topics on platforms like X, injecting false narratives into mainstream conversations. Adding another layer of deception, operatives infiltrated online communities, interest groups, and discussion forums, seeding disinformation through fabricated videos, doctored images, and misleading articles. To further enhance credibility, the campaign employed astroturfing tactics, crafting the illusion of grassroots movements, making the disinformation appear authentic and widely supported.[2]

Through a relentless and strategic reinforcement of targeted narratives, Russia sowed doubt, confusion, and demoralization among large segments of the Ukrainian population. As Peter Pomerantsev aptly observed, "Russia doesn't just deal in petty disinformation, forgeries, lies, leaks, and cyber-sabotage usually associated with informational warfare. It reinvents reality, creating mass hallucinations that translate into political action."[3] This ability to manipulate perception on a massive scale is evident in the ever-evolving complexity and sophistication of Russia's cyber warfare tactics over the past two decades.

In 2008, Russia unleashed a wave of rapid, synchronized, and overt cyberattacks in Georgia—executed with the precision of a DA mission. Massive, distributed denial-of-service attacks crippled key internet services, shutting down media outlets, financial institutions, and government websites as part of a larger, well-coordinated strategy. Rather than inflicting physical damage to the network, these attacks were designed to sow chaos and uncertainty, creating the perfect smokescreen for Russia's invasion of South Ossetia. The cyber onslaught served as a force multiplier, disrupting

communication, destabilizing decision-making, and ensuring that confusion reigned just as Russian forces moved in. Figure 1 illustrates how rapidly Russia has matured in its use of cyber tactics, especially in espionage, as a strategic tool of influence.

Figure 1. A chart illustrating the increase in Russia's cyber operations over time. Source: Wilner et al, "Offensive Cyber Operations and State Power: Lessons from Russia in Ukraine," International Journal, 79(1), 138–148.]

Russia's cyber campaigns in Ukraine and Georgia demonstrate the power of disinformation and virtual warfare in the gray zone by shaping the battlefield before military action even begins. These operations serve as a blueprint for integrating cyber-enabled influence tactics into SOF strategy. More than isolated attacks, cyber operations have become essential components of contemporary conflict—force multipliers that disrupt, deceive, and destabilize. For SOF to remain effective in this evolving battlespace, cyber capabilities must be fully embedded within its operations. By analyzing these case studies, SOF can analyze existing authorities, C2 structures, and the necessary adjustments to equip forces for the complexities of modern competition.

Legal Framework for SOF Cyber Operations

Having demonstrated the advantage of cyber effects in military operations, addressing the legal and structural challenges involved in integrating these capabilities within SOF is crucial. USC Titles 10 and 50 govern the execution of special operations activities conducted by USSOCOM to support the DoD national defense efforts. Title 10 provides the statutory foundation for the roles, responsibilities, organization, and employment of forces within the DoD and establishes the legal framework for military operations.[4]

In contrast, Title 50 outlines the roles and responsibilities of the intelligence community, including CIA operations and functions, and establishes congressional notification requirements for intelligence activities, including covert and clandestine activities.[5] Although Title 50 refers to activities and authorities conducted by the intelligence community, the most senior leader of the DoD, the Secretary of Defense (SecDef), also possesses significant authorities under Title 50. Furthermore, the authority affirms the SecDef's control over U.S. intelligence community members that are part of the DoD, such as the National Security Agency and Defense Intelligence Agency. It permits the SecDef to delegate specific title authorities to subordinate defense department organizations to support intelligence activities essential to national security.[6]

Operating under Title 10, SOF provide the DoD and national leaders with highly skilled and trained forces capable of responding to emerging threats worldwide with speed and strategic impact. Moreover, SOF conduct specialized missions to address national security threats, including UW, CT, and SR.[7] Although SOF have previously operated under Title 50 authorities—most notably during the raid on Osama bin Laden's compound in Pakistan—they must now establish a dedicated theater-level SOF-cyber force capable of conducting integrated cyber missions. As strategic competition intensifies in the cyber domain, SOF must evolve to enhance their

effectiveness in modern warfare.

USC and approved legislation (e.g., the National Defense Authorization Act) permit SOF the necessary authorities to execute high-priority missions and sensitive activities in and through cyberspace to shape the operational environment, counter adversarial activities, and respond quickly to the threats of the 21st century. One key authorization example is Title 10 USC Section 394, which allows USSOCOM, through the Assistant Secretary of Defense for Special Operations/Low-Intensity Conflict, to establish a dedicated cyber operations organization.[8] This vital inclusion of subsection (c) underscores the growing requirement of SOF's role in cyber operations. Moreover, it permits USSOCOM to establish a tailored SOF-cyber force with the required authorities to enhance theater-level operational effectiveness in a highly contested cyber domain.

Despite these legal authorities, USSOCOM must accelerate organizational change and establish a theater-level SOF-cyber force to support the geographic combatant commander's most challenging SOF-cyber mission requirements. Recognizing this urgent need, USSOCOM formally submitted a DOTmLPF—doctrine, organization, training, materiel, leadership and education, personnel, facilities, and policy change recommendation (DCR) through the Special Operations Command Requirements Evaluation Board to advocate for this specific operational requirement. However, the DCR remains under senior leader review to ensure all administrative and operational requirements are fully identified before final approval.

Until this process is complete, USSOCOM remains constrained in effectively integrating SOF-cyber capabilities necessary to meet emerging global threats. With these legal authorities well established, the next priority is to create an operational framework that enables SOF to conduct cyber missions successfully. The SOCE will be a customized solution designed to fulfill this requirement.

The Special Operations Cyber Element

Leveraging authorities in Title 10, Chapter 19, USSOCOM can request the establishment of a tailored cyber operations organization to meet the demands of SOF mission requirements. This organization would be a SOCE operating under a hybrid C2 structure, integrating USSOCOM and U.S. Cyber Command (USCYBERCOM) capabilities and authorities (specifically, offensive cyber operations [OCO] authorities) to address the rapidly evolving cyber threat landscape. This element would function as a SOCE, with direct operational control (OPCON) under USSOCOM while maintaining tactical coordination with USCYBERCOM for cyber mission deconfliction. The SOCE would embed cyber operators within SOF units to conduct OCO, MISO-influence operations, and virtual reconnaissance in denied, contested, and sensitive environments. TSOCs would provide regional cyber coordination to ensure cyber-enabled SOF missions align with combatant commander (CCDR) objectives.

Overcoming Challenges in Cyber Command and Control

C2 is the exercise of authority and direction by a designated commander over assigned and attached forces to enable the effective synchronization and integration of force activities to achieve mission success.[9] Moreover, C2 enhances a commander's ability to make timely, well-informed decisions in a technologically driven age. With modern warfare increasingly shifting to the cyber domain, compounded by the rapid processing of information, swift decision-making can determine whether a mission succeeds or fails.

As a result, there is a growing debate over the future organizational structure of DoD Cyberspace Operations Forces (COF), driven by the expanding requirements of cyber missions and the increasing demands placed on combatant commands (COCOMs)

With modern warfare increasingly shifting to the cyber domain, compounded by the rapid processing of information, swift decision-making can determine whether a mission succeeds or fails.

with limited available cyber force capabilities.[10] Given SOF's unique ability to gain access and placement in key geographic areas, a reassessment of the current cyber forces' C2 structure is necessary to ensure SOF can effectively support the most complex and demanding operational cyber requirements of the CCDR worldwide.

With the cyber C2 challenges, the proposed SOCE structure will offer flexible SOF options by enabling faster cyber effects, counter-cyber operations against state and non-state actors, and seamless integration of cyber into SOF's core activities and mission sets. The SOCE will continue to support coordination efforts with USCYBERCOM to ensure effective planning and deconfliction of cyber operations across geographic theaters of operation. However, USSOCOM will have a dedicated cyberspace operations force at its disposal, allowing it to determine the timing and tempo of cyber operations tailored to its specific SOF mission requirements. As USSOCOM prepares to leverage cyber tactics, it must also build a comprehensive training pipeline to ensure cyber operators are equipped to handle modern threats.

Satisfying Planning and Training Requirements

In the DoD COF memo dated 2019, the USSOCOM COF were designated as outside the purview of USCYBERCOM's official definition of DoD COF.[11] In other words, USCYBERCOM does not have OPCON, COCOM, or tactical control of COF assigned to USSOCOM. This indicates that USSOCOM must organically invest in organizing, funding, and training its COF. The SOCE will align with

this construct and will satisfy USSOCOM's requirement of organic cyberspace operations forces.

SOF must be at the front lines of this convergence, ready to deploy its COF to conduct operations and not rely solely on USCYBERCOM for its activities. An official recognition of a SOCE will shift the mindset of military planners and place greater emphasis on the importance of comprehensive and rigorous training for cyber operators. Although cyberspace has been recognized as a separate domain of operations inside the information environment, it is still often treated as an afterthought in military planning.[12] Cyber operations have not wholly entered the mindset of military planners, decision-makers, and commanders.[13] A dedicated SOCE would act as a catalyst to integrate cyber operations into the overall strategic framework.

SOF can use its unique placement and access capabilities to achieve a cyber effect to support its forces and the joint force supporting the campaign plan.[14] Cyber operations affect all other SOF activities, and the value proposition of highly skilled cyber operators is only increasing with the advent of new technologies. As Starling and Cartwright point out, special operators are not only trigger-pullers, they must also be highly skilled in space and cyber operations—specifically geared toward gray zone operations or competition up to large-scale combat operations.[15]

A SOCE with expanded cyber responsibilities, specifically organized for USSOCOM, requires robust training requirements to ensure a standardized and lethal cyber force. This necessitates the development of specialized training programs, ensuring operators receive the highest level of education and preparedness. Standardizing these programs across all SOF components and providing incentive pay will attract highly skilled personnel and ensure uniformity in operators' capabilities. Such measures are imperative as they impact and enhance all other core activities

within the special operations framework, leading to a more effective and cohesive force.

One way to look at training options is to examine similarities elsewhere in academia, where the need for specialized training has arisen. In a 2015 Rand study, Jennifer Li and Lindsay Daugherty argue that similarities exist between language skills and cyber expertise, including the need for highly specialized skills that require extensive training, a need to quickly build capacity, and a limited pipeline of candidates.[16] The integration of rigorous cyber training programs, similar to those designed for language skills, is crucial to maintaining a competitive edge in modern warfare.[17] USSOCOM must establish a tiered cyber training program, modeled after language proficiency systems, in which operators advance through foundational, intermediate, and advanced levels. This approach creates a scalable force with the requisite cyber skills to seamlessly integrate into SOF operations.

While multiple and tailored training syllabi certainly provide flexibility in producing cyber warriors, the difference in training tasks and standards sometimes puts organizations and commanders in tough positions, as they are unsure of the operator's skill. A standardized training curriculum, therefore, is essential for uniformity and for fostering trust in the operators' capabilities among commanders. Concurrently, General Timothy D. Haugh, former USCYBERCOM Commander, has said they are the DoD's joint cyberspace trainer, enabling joint training standards.[18]

USSOCOM may be able to harness the benefits of the joint cyberspace trainer environment to provide a foundation of knowledge combined with specialized, modular training pipelines that are currently offered elsewhere and are needed by SOF. This enables USSOCOM to leverage new and emerging technologies and meet expeditionary requirements. By integrating a joint training environment, USSOCOM can ensure all operators meet a unified

standard while also benefiting from the innovation and flexibility of various training methodologies. This hybrid approach enables continuous adaptation to emerging threats and technological advancements, thereby maintaining a dynamic and resilient cyber force.

Summary

The changing characteristics and accelerated pace of modern warfare have created a synergistic relationship between cyber and SOF operations. The benefit of SOF operations is its ability to foster relationships that enable access and placement, such as MISO, SR, FID, civil affairs, and UW, making it a critical enabler of cyber operations.

U.S. adversaries—Russia, China, Iran, and North Korea—are aggressively leveraging non-kinetic methods of OCO and espionage to achieve their strategic objectives. These tactics enable them to disrupt, manipulate, and gain significant advantages while avoiding the political, financial, and military risks of conventional warfare. To compete in campaigning and prevail in conflict, SOF must integrate cyber into training, tactics, and procedures to enhance operational effectiveness.

The DoD must swiftly integrate cyber capabilities across all facets of the National Military Strategy. U.S. SOF, with their expertise in operating within gray zones, decentralized decision-making, and conducting covert and clandestine missions, are uniquely positioned to evolve force structure by incorporating specially trained cyber operators. This enables U.S. SOF to dominate the cognitive domain and shift the balance of power by directly targeting and disrupting adversaries' decision-making processes, ensuring that the U.S. maintains a decisive advantage in modern conflict.

The Way Ahead

The time to act is now. Since its inception, USSOCOM has consistently delivered SOF-unique capabilities and solutions to commanders downrange. However, as cyber operations become an essential pillar of modern warfare, USSOCOM must evolve to meet the challenge by establishing and sustaining an organic cyber force through a dedicated cyber element or a specialized development group. The modern battlefield is no longer confined to physical domains; dominance in the digital realm is now equally critical to mission success.

To maintain SOF's competitive edge, USSOCOM must take decisive action by formally securing funding and personnel allocations to launch a pilot SOCE and establish a SOF-cyber training program. This initiative will serve as proof of concept, laying the groundwork for the full-scale development of a dedicated cyber force. Failure to act now risks ceding a vital strategic advantage to adversaries who have already recognized the critical role of cyber warfare and are aggressively advancing their capabilities. In an era where digital and physical battlefields are inseparable, USSOCOM's ability to integrate cyber expertise into SOF operations will be a decisive factor in future conflicts.

The modern battlefield is no longer confined to physical domains; dominance in the digital realm is now equally critical to mission success.

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Revitalizing the C-130 Hercules: AI-Piloted, Uncrewed Cargo Aircraft for Next-Generation Logistics in the U.S. Indo-Pacific Command Theater of Operations

By J. Brian Pruitt, MA, MSIT

"Amateurs talk strategy and professionals talk logistics." - Omar Bradley, first chairman of the Joint Chiefs of Staff

As the Pacific region becomes increasingly critical for global security, the need for efficient and reliable logistics and cargo delivery capabilities is paramount. The concept is simple: Take recently retired C-130 Hercules (C-130H) cargo aircraft, upgrade them with AI piloting technology, and deploy them as uncrewed cargo delivery vehicles. By leveraging the C-130H's proven track record and adapting it to modern AI auto-flight technology, United States Special Operations Command (USSOCOM) can enhance its logistics capabilities, reduce risks, and improve the effectiveness of U.S. Special Operations Forces (SOF) operations in the Indo-Pacific Command (INDOPACOM) theater.

Still a Viable Platform

The C-130H, once a stalwart of the U.S. Air Force's cargo fleet, has been a cornerstone of logistics and cargo delivery operations for decades. However, with the introduction of the newer, more advanced C-130J Super Hercules, all C-130H inventory has been retired and placed in desert storage. However, these aircraft still have airframe life available. Using AI auto-flight, developed by the Air Force Research Lab (AFRL) and existing, retired C-130 assets, SOF could gain a much-needed logistics capability to prevail in a great power competition (GPC) against a sophisticated adversary, such as the People's Republic of China. INDOPACOM is the chosen theater for deployment due to the vast distances involved in this area of the world and the possibility of widely dispersed SOF personnel. This

will fill the need to provide greater numbers of SOF-peculiar, reliable cargo delivery platforms and emphasizes using existing but latent resources in the form of retired cargo aircraft to reduce the cost and time required to implement the capability.

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Background

The C-130H has an impressive operational record with more than 50 years of service and a reputation for reliability and versatility. While modern aircraft have replaced many C-130Hs, the need for cargo delivery capabilities remains acute, particularly in remote or contested areas where infrastructure is limited. AI piloting technology has advanced significantly, enabling autonomous aircraft to operate safely and efficiently. The maximum cargo capacity of the C-130H is 35,000 pounds with a range of 1,496 miles.[1] Moreover, operating a C-130H—because it is used by air forces around the world—attracts no special attention at airports. It is simply seen as another trash hauler. These C-130H cargo aircraft are stored in "warm storage," which means they require a relatively routine level of effort, consisting of removing environmental seals, refilling fluids, and performing operational checks to remediate failures.[2] Warm storage often supplies friendly foreign militaries with still-useful equipment. Instead of buying and fielding a brand-new airborne cargo solution, an existing, capitalized resource could be used.

U.S. Air Force C-130H sit at the 309th Aerospace Maintenance and Regeneration Group on Davis-Monthan Air Force Base, Arizona. (U.S. Air Force photo by Staff Sergeant Sergio A. Gamboa)

Proposed Solution: Why the Conditions and Timing Are Right Today

Retrieving retired C-130Hs from storage and upgrading them with AI piloting technology would provide a cost-effective solution for enhancing logistics and cargo delivery capabilities in the Pacific. The AI system would be designed to operate with existing ground control stations and communication networks, ensuring seamless integration with existing logistical infrastructure.

Using technologies that provide an alternative to GPS (e.g., vision-based navigation, Stellar Navigation) can ensure an aircraft's location awareness is not effectively spoofed or denied. Flying in autonomous mode, with the AI crew autopilot flying by waypoint, the plane could make a cargo delivery and return to base with minimal-to-no requirement for remote human input. Additionally, AI flight technology has developed to a point of maturity that recently (May 2024) U.S. Air Force Secretary Frank Kendall III flew in an AI-piloted aircraft.[3] An AI autopilot autonomous flight system could

have a roll-on, roll-off capability: It can be optionally manned for normal, crewed flights, and then, in times of conflict, autonomous mode can be enabled.

This solution would take 30 C-130Hs out of warm storage, recondition them for flight, and then tie an existing AFRL AI control software, such as Vigilant Spirit Control Station, to control multiple aircraft.[4] While a solution to automatically eject cargo pallets and open the rear cargo door must be sourced or developed, supplies—using automatically steered parachutes already developed for SOF use—could land at a designated collection point, all without human intervention.

These autonomous aircraft could be operated behind the weapons engagement zone, delivering weapons, ammunition, and other supplies to SOF without the risk associated with a crewed aircraft. Autonomous aircraft could also be operated, if the need were apparent, as an attributable resource on a one-way mission at extreme range with no expectation of reuse. Further, when coupled with an offensive system—such as the AFRL-developed palletized effects from cargo aircraft, known as Rapid Dragon—cargo aircraft could be turned into a reusable, recoverable, and low-risk offensive weapon capability.[5]

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Rapid Dragon operational prototype, which was integrated on a U.S. Marine Corps KC-130. The photo, taken during a flight demonstration in April 2023, shows a heterogeneous loadout flight test conducted in an Air Force Strategic Development Planning & Experimentation/United States Marine Corps partnership. (Courtesy photos)

These aircraft could be pre-positioned at friendly locations throughout the INDOPACOM area with pre-palletized cargo buildouts, ready for immediate use and accomplished without attracting special attention. Additional mission possibilities—limited only by imagination—all have the potential to help win the next fight.

The concept is in action today with mission control elements (MCEs) flying RQ-4B Global Hawk (U.S. Air Force) and BAM (Navy) aircraft. The MCEs are located at Beale Air Force Base, Marysville, California, and Naval Air Station Patuxent River, Patuxent River, Maryland, respectively. Missions are flown by mouse clicks and waypoints, with auto-land and autopilot software enabling long-distance operation. The MCE operators make and receive radio calls as they enter and leave airspace and monitor aircraft systems parameters.[6]

A similar way of operating could be achieved with autonomous C-130Hs maneuvered in a semi-autonomous mode with MCEs

during peacetime, and, having full autonomy, with pre-programmed waypoints during times of war. Additionally, one MCE-based flight crew could control multiple aircraft. Launch and recovery element is a ground control station used for launching and recovering aircraft. An AI system could use real-time environmental intelligence to avoid an area or altitude with icing or thunderstorms. The addition of terrain-following capability could allow for low-level operation that would skirt radar detection.

A graduated approach (crawl, walk, or run) would enable Air Force Special Operations Command to test the concept and measure effectiveness. Start with one airframe, conduct integration and testing—to include test flights—and then move the prototype to an operational test and evaluation series of sorties. Until there is confidence in the system, a flight crew can be onboard to monitor the systems. If the capability is developed as a roll-on, roll-off system, the system can be produced and shelved until an imminent need arises. Expanded capacity can also apply to other aircraft in storage, such as the KC-10 tanker/cargo aircraft, if the C-130H autonomous flight project is deemed successful.

Finally, the regulator environment, in the process of changing in a way that supports an AI-enabled unmanned aerial system (UAS) and beyond visual line of site (BVLOS) flight, providing, in part, "The Secretary of Transportation, acting through the Administrator of the [Federal Aviation Administration (FAA)], shall ensure all FAA UAS Test Ranges are fully utilized to support the development, testing, and scaling of American drone technologies, with a focus on BVLOS operations, increasingly autonomous operations, advanced air mobility, and other advanced operations."[7]

Recommendations

The 309th Aerospace Maintenance and Regeneration Group, often called "The Boneyard," is a U.S. Air Force aircraft and missile

storage and maintenance facility located on Davis-Monthan Air Force Base in Tuscon, Arizona. The C-130H is one of the most represented aircraft on-site. As of October 17, 2024, there are 65 C-130H aircraft in storage, providing ample opportunity to take 30 of the best aircraft, recondition them, and then configure for autonomous flight.

The proposed solution offers several benefits, including:

1. **Cost savings:** Upgrading retired C-130Hs is more cost-effective than procuring new aircraft.

2. **Reduced risk:** AI-piloted aircraft eliminate the risk of crew loss or injury.

3. **Increased efficiency:** Autonomous operations enable continuous, around-the-clock cargo delivery to SOF, and airlift can occur during weather minimums that would leave a crewed aircraft grounded.

4. **Enhanced flexibility:** The C-130H's versatility in various environments and weather conditions makes it an ideal platform for Pacific operations.[5] An uncrewed C-130H can be operated using techniques normally considered too risky for a manned aircraft, which allows for greater flexibility.

5. **Less reliant on MC-130J:** With fewer than 60 airframes, the MC-130Js can focus on complex missions requiring onboard crews. Autonomous C-130Hs can then focus on the three Ds (dull, dirty, and dangerous) missions involving SOF cargo resupply and other taskings, allowing this SOF-peculiar variant, a scarce resource, to be used only when truly needed.

Revitalizing retired C-130Hs with AI piloting technology offers a unique opportunity to enhance the U.S. military's logistics and cargo delivery capabilities for SOF in INDOPACOM. By leveraging the C-130H's proven track record and adapting it to modern, autonomous operation technology, USSOCOM can improve the effectiveness of its operations, reduce risks, and enhance its ability to prevail in the event of a GPC. ♠

About the Author

James "Brian" Pruitt is an Air Force veteran who served at Clark Air Base, Luzon, Philippines, as a technical controller immediately before the eruption of Mount Pinatubo. He works as a systems engineer involved in USSOCOM acquisitions, where he uses his skills to try to bring the very best in systems to the SOF warrior. Pruitt has two master's degrees, one focused on international relations and the other on information technology and security systems. With lifelong interests in military history, aviation focus, and AI complex information systems, he hopes to add a creative perspective toward fighting and winning the next conflict.

Notes

1. "C-130H Hercules," *Air & Space Forces Magazine*, https://www.airandspaceforces.com/weapons-platforms/c-130h/.

2. "Inventory Database Aircraft Type Summary," AMARC Experience, https://www.amarcexperience.com/ui/index.php?option=com_content&view=article&id=205&Itemid=274.

3. Mikayla Easley, "Inside the AI-Enabled Pilot that Flew Air Force Secretary Kendall Through a Dogfight," *Shield AI*, October 23, 2024, https://shield.ai/inside-the-ai-enabled-pilot-that-flew-air-force-secretary-kendall-through-a-dogfight.

4. Mindy Cooper, "AFRL Shares UAV Software to Further Research," Wright-Patterson Air Force Base, August 30, 2017, https://www.wpafb.af.mil/News/Article-Display/Article/1295072/afrl-shares-uav-software-to-further-research/.

5. "Rapid Dragon Delivers Palletized Effects from Cargo Aircraft," AFRL Website, https://afresearchlab.com/technology/rapid-dragon.

6. Omar Memon, "5 ISR Missions Of The RQ-4 Global Hawk for the U.S. Military" *Simple Flying*, July 23, 2024, https://simpleflying.com/5-isr-missions-rq-4-global-hawk-us-military/.

7. Executive Order No. 14307: Unleashing American Drone Dominance, Federal Register, 2025, https://www.federalregister.gov/documents/2025/06/11/2025-10814/unleashing-american-drone-dominance.

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2026

ACADEMIC YEAR

CALL FOR
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PART V
AY2026 JSOU
CALL FOR SPECIAL OPERATIONS PAPERS

Introduction

Each year, JSOU's Call for Special Operations Papers program encourages those in the SOF enterprise to research and write short, impactful papers that promote discourse, spark idea generation, and offer innovative solutions for SOF organizations, processes, equipment, exercises, and more.

This research helps capture emerging concepts, highlight operational challenges, and identify opportunities for applied research, creating a vital link between SOF education and operations.

The results of the 2025 inaugural Call for Special Operations Papers effort are included in this edited volume, and some of these ideas are already being implemented across the SOF enterprise.

In short, **your research matters**—and it makes a difference.

Topics

For the AY2026 Call for Special Operations Papers, a broad theme of technology in SOF was chosen. Ten emerging and forward-looking topics from the 2026 *Special Operations Research Topics* booklet were selected:

1. Machine Learning and Artificial Intelligence in Targeting

2. Next-Generation Intelligence, Surveillance, and Reconnaissance/Tactically Relevant for Advanced Situational Awareness

3. Space-Cyber-SOF-STRATCOM Nexus: How to Build Capabilities Greater than the Sum of Its Individual Parts

4. Ethical, Legal, and Operational Challenges of AI-Driven Warfare and Autonomous Systems

5. NEXUS/Triad Strategic-Level Synthesis

6. Harnessing Data for Irregular Warfare

7. Digital Force Protections: Threats and Risks to SOF

8. Rapid All-Domain Fusion for SOF

9. SOF Use of Non-Government Hackers in Support of Strategic Objectives

10. Optimizing Drone Use and Counter-Unmanned Aerial Systems Strategies

Categories

To ensure divergent and convergent perspectives from throughout the SOF enterprise, submissions will be divided into the following categories:

CATEGORY 1: Professional military education (PME) students and military practitioners: Students enrolled in PME programs and currently serving military professionals.

NEW! CATEGORY 2: International allies and partners: Contributors from allied and partner nations engaged in special operations or related fields.

CATEGORY 3: Academic faculty and civilian scholars: University faculty, independent scholars, and civilian experts in national security, strategy, and related disciplines.

NEW! CATEGORY 4: Fiction. Open to all: Works that explore future conflict, SOF roles, or strategic challenges through narrative and storytelling. While the topic for this category may align with one of the 10 topics, it is not required as long as the story maintains a clear connection to technology and SOF.

All submissions must be unclassified and not exceed 5,000 words. Papers will be evaluated by a panel of subject matter experts, and winning submissions will be recognized by the USSOCOM Commander and the JSOU President and published by the JSOU Press.

The submission deadline is February 23, 2026.

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2025
ACADEMIC YEAR
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PAPERS

This edited volume contains winning and high-scoring submissions from JSOU's Academic Year 2025 Call for Special Operations Papers program—an inaugural effort with modest expectations. Proving that those in the SOF enterprise remain engaged in public dialogue and invested in academic scholarship, more than 40 papers were submitted from operators, enablers, educators, students, and scholars representing a true cross-section of the SOF community.

Topics align with the U.S. Special Operations Command (USSOCOM) priorities of PEOPLE, WIN, and TRANSFORM and provide thoughtful research, innovative insights, and creative solutions. Winners were recognized by the USSOCOM Commander and JSOU President.

To learn more about JSOU's annual Call for Special Operations Papers program, please visit https://www.jsou.edu/press/callforpapers.

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