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**Deeds and Words:
An Integrated Special Operations Doctrine for the Canadian Forces**

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ABSTRACT

Warfare has changed since the end of the Cold War and the events of 11 September 2001. The Westphalian model of state versus state conventional clashes has been replaced by unconventional and irregular wars with small, rogue nations and non-state actors that use asymmetric means to try and defeat large conventional militaries. This has led to an increase in the importance of Special Operations Forces (SOF) among Canada's allies and their integration into joint warfighting capabilities. This position has been clearly laid out in the Canadian government's 2005 Defence Policy Statement. Special Operations (SO) and SOF are defined and used to show Canada's need for such forces. Current Canadian policy and doctrine are analysed with respect to the development and integration of SOF, and then compared to the doctrine of two allies: the U.S., which is Canada's largest military partner and the world leader in SOF, and Australia, a smaller allied nation with similar security needs, especially the requirement for interoperability with the U.S. This analysis is then used to make recommendations for Canadian SOF doctrine, including new definitions and a Canadian SOF Task List, as well as joint and elemental doctrine defining the effective integration of SOF with conventional forces and as interoperability with Canada's allies.

“Our special forces are the tool of choice. They are in incredible demand.”¹

INTRODUCTION

The above statement was made by the Canadian Chief of Defence Staff (CDS) in a speech on 28 March 2007, to the Canadian Club in Ottawa, in reference to Canada’s Special Operations (SO) unit, Joint Task Force 2 (JTF2). It clearly indicates the growing importance of Special Operations Forces (SOF) for Canada. Further, an examination of the current security needs of Canada reveals a requirement for military operations across the spectrum of conflict, including SO integrated with conventional operations.²

Achieving integration between SOF and conventional forces is not impossible, and is achievable for even a small military such as that of Canada. If this is indeed the case, as the Canadian Forces (CF) seek to increase their involvement in the field of SO, it will have far-reaching implications throughout all branches of the military. At present,, however, doctrine regarding the integration of SOF and conventional forces has been nearly absent, as evidenced in the joint and service documents that have been produced in this century. If Canada’s situation is compared to those in other nations, it can be seen that solutions do exist and can be proposed for inclusion into CF doctrine.

How should the CF proceed to fully integrate their special and conventional forces, in order to operate effectively in the new security environment, while still respecting that which makes such forces “special?” There are two very relevant examples of nations that have made the required steps within their militaries: the United States and Australia. Using these leads, as well as SO theory, it is possible to offer a

¹ Gen Rick Hillier in Bruce Champion-Smith, “Elite Forces ‘Tool of Choice’ in Afghanistan,” *The Star*, 28 March 2007 [journal on-line]; available from www.thestar.com; Internet; accessed 31 March 2007.

² In this sense, “conventional” refers to non-SOF forces, not non-nuclear.

Canadian definition of SO, to explain the requirement for SOF in the Canadian context, and to detail the current state of Canadian policy and doctrine regarding such forces.

Following some notable successes and failures in SO, highlighting the necessity of good integration, the U.S. military has made tremendous efforts to achieve the required results and, assisted by its tremendous resources, has become the world leader in the field. The Australian Defence Force (ADF), similar in size and make-up to the CF, has sought to develop a leading edge SO capability that is deployable around the world and across the spectrum of conflict, operating with the full support and involvement of conventional forces.

These two examples provide valuable lessons for Canada as transformation continues and SOF are more fully developed. Comparisons can then be made in order to draw conclusions about changes that must take place with all branches of the CF to effectively integrate SOF and conventional forces and to make recommendations for future doctrine, force generation, and force employment. Once this is done, it will be seen that Canada has much work to do but that it is achievable within existing resources, if given the requisite level of importance and effort. To date, this has not been the case and integration between conventional forces and SOF has been poor.

There is one significant difficulty in studying SOF development and operations. Given the sensitive nature of their employment, the documentation surrounding SOF is frequently highly classified. While there is sufficient, albeit not appropriate, doctrine available in this country and many others, modern, real-life examples are difficult to find or to include in unclassified, academic forums. However, it is possible to draw valid conclusions and make recommendations regarding the integration of special and

conventional forces using open sources such as academic and professional writing, military doctrine and publications, and statements made by defence and government officials. This tendency towards secrecy, however necessary, limits research in the field, and is itself a hindrance to effective integration with conventional forces, as will be discussed later. Given the future security environment, the integration of SOF and conventional forces is essential for the war-fighting credibility and ability of the CF.³

³ The genesis of this paper lies in the author's experiences while working as an operational planner at 1 Canadian Air Division Headquarters in the three years following 11 September 2001. In particular, three events involving the integration of the Air Force and Joint Task Force 2 (JTF2), Canada's Special Operations unit, highlighted the state of the CF's ability to integrate special and conventional operations. These were the deployment of JTF2 to Afghanistan in 2001, Contingency Operation Plan (CONPLAN) CONDOR, and Exercise OSPREY STRIKE. While the details of these activities remain classified, and therefore beyond the scope of this study, they serve to underline the reality of force integration in Canada using very real people and incidents.

“How can a special operations force that has inferior numbers and the disadvantage of attacking the stronger form of warfare gain superiority over the enemy? To understand this paradox is to understand special operations.”¹

CHAPTER 1 – DEFINING SPECIAL OPERATIONS FORCES

In order to understand the need for the integration of special and conventional forces, it is necessary to define “Special Operations” and “Special Operations Forces.” Canadian doctrine is non-existent on this subject and *Canadian Forces Operations* contains no doctrinal definition.² The Special Operations chapter of the doctrine manual states only “Under development.”³ Likewise, the homepage for Canadian Special Operations Command (CANSOFCOM) has no definition of SO or SOF, only statements about the units under its command and prose about “exciting times.”⁴ In order to continue with a study in comparative doctrine, so that recommendations can be made to meet Canadian defence needs and objectives, these first principles must be established. The often misused and interchanged terms SO and SOF need to be clear, as well as the tasks that are considered the purview of these forces. In addition, the concepts of doctrine, interoperability and integration will form the basis for any comparison.

SO THEORY

¹ William H. McRaven, *Spec Ops* (Novato CA: 1995), 4.

² British and Australian forces refer to their SOF as “Special Forces.” In the U.S., only the Green Berets of the US Army are called SF, all remaining forces (SEALS, etc) are referred to as SOF, and this term is also used generically to refer to all forces under the command of USSOCOM. For this study, the term SO will refer to the operation, while SOF will refer to the forces that conduct SO. SOF can also be further defined as Tier 1 and Tier 2, with some authors adding a Tier 3. Tier 1 are the SO assault forces (only JTF2 in the CF), while Tier 2 are those forces that provide direct support to Tier 1, such as the CSOR. For this study, the generic term SOF will refer to both Tier 1 and Tier 2, operating in an integrated manner.

³ Department of National Defence, B-GJ-005-300/FP-000 *Canadian Forces Operations* (Ottawa: DND Canada, 2005), 29-1. Hereafter referred to as *Operations*.

⁴ http://www.cansofcom.forces.gc.ca/en/index_e.asp; Internet; accessed 11 April 2007.

To create definitions of SO and SOF, their theory needs to be first analysed so that valid definitions can be extracted. Perhaps the seminal book on SO theory is *Spec Ops* by William H. McRaven. Written in 1995, it uses a series of missions throughout the 20th Century in order to draw conclusions regarding the SO theories and practices. His basic concept is that SOF do not use a numerical advantage to defeat an enemy. Rather, they achieve “relative superiority. . . when an attacking force, generally smaller, gains a decisive advantage over a larger or well-defended enemy.”⁵ This relative superiority is achieved and sustained at “the pivotal moment in an engagement” in order to accomplish their mission.⁶ McRaven writes that this victory is achieved using six Principles of Special Operations: simplicity, security, repetition, surprise, speed, and purpose. By planning, rehearsing and conducting their operations in accordance with these principles, SOF are considered “special.” Conventional forces may employ some of these concepts in some operations, and two are also listed as Canadian Principles of War.⁷ Large conventional forces, however, will rarely be able to bring all six of these principles to bear in all circumstances.

The Commander, Special Operations Command (SOCAUST), Australia offers another philosophy of that which makes SOF “special.” He uses five tenets that differentiate special from conventional forces:

Simply put, to be effective, special forces must be able to provide economy of force; they must offer expanded or alternative options; they must be able to function in the asymmetric environment; they must be organisationally agile; and

⁵ McRaven, 4.

⁶ McRaven, 4-5.

⁷ The Canadian Principles of War are Selection and Maintenance of the Aim, Maintenance of Morale, Offensive Action, Security, Surprise, Concentration of Force, Economy of Effort, Flexibility, Cooperation, Administration. Department of National Defence, B-GL-300-001/FP-000 *Conduct of Land Operations* (Ottawa: DND Canada, 1998), 10.

they must be comfortable in a cooperative joint, combined and interagency framework.⁸

Again, like McRaven, Hindmarsh ascribes attributes to SOF that might also apply to conventional forces. However, it is rare that a conventional force would be effective at asymmetric warfare or offer alternative options. Hindmarsh does not believe that, at the individual level, SOF soldiers are better than conventional ones. Rather, it is their force structure; the ability to offer different options that makes these forces “special.”⁹ SOF are small forces that offer a different approach to a military operation, using techniques and procedures that are unique to their forces. According to Hindmarsh, that is what makes them “special” and distinct from conventional forces. Combining the work of McRaven and Hindmarsh, the theory and philosophy of SO and SOF can be used to analyse current definitions and to develop new ones.

SO AND SOF DEFINITIONS

There is no joint Canadian doctrine for SO. The definition that is currently being used by the Commander of CANSOFCOM to guide the work of the command is from AJP-01(B), a North Atlantic Treaty Organization (NATO) publication, which defines SO as “military activities conducted by specially designated, organised, trained and equipped forces using operational techniques and modes of employment not standard to conventional forces.”¹⁰ This definition, however, does not define the *operation* per se; it defines them by the *forces* who conduct them. Further, its definition is limited in that it

⁸ Major General Mike Hindmarsh, “The Philosophy of Special Operations,” *Australian Army Journal* III, No.3 (Summer 2006): 20.

⁹ Hindmarsh, 13.

¹⁰ North Atlantic Treaty Organization, AJP-01(B) *Allied Joint Doctrine* (Brussels: NATO, 2002), 8-1 and Col D. Barr, “SOF Doctrine Brief” (lecture, Canadian Forces College, Toronto, ON, 16 November 2006), with permission.

defines them by employment that they do not undertake, as opposed to that which they do. In order to develop a rationale for Canadian SOF, it is necessary to develop a working definition that is more positive and based upon the roles and tasks that SOF will complete.

McRaven uses his six principles to introduce a definition of SO that is more positive in its approach. “A special operation is conducted by forces specially trained, equipped, and supported for a specific target whose destruction, elimination, or rescue (in the case of hostages), is a political or military imperative.”¹¹ This definition introduces two key aspects. First, it gives a broad statement of tasks: target destruction or elimination and hostage rescue. It also introduces the need for mutual support when executing a specific operation. This is an important part of the integration of special and conventional forces: the support between the two arms.

The United States military has a different doctrinal definition for SO. It defines them as “operations conducted in hostile, denied, or politically sensitive environments to achieve military, diplomatic, informational, and/or economic objectives employing military capabilities **for which there is no broad conventional force requirement.**” [bold in original]¹² This American joint doctrine adds three elements to the definition. The first is the idea that tactical operations and units can have a strategic impact beyond that of just defence by including the variables of diplomatic and economic objectives. The second is that SOF undertake tasks that are very specific and not wide enough in

¹¹ McRaven, 2.

¹² United States, Department of Defense, JP 3-05 *Doctrine for Joint Special Operations* (Washington: U.S. Government Printing Office, 2003), I-1. [online]; available from <http://www.au.af.mil/au/awc/awcgate/awcgate.htm>; Internet; accessed 3 December 2006. Hereafter referred to as JP 3-05.

scope that a conventional need exists. The third is the nature of the military environment in which SO are conducted. In particular, the doctrine manual expands on the first concept, as it defines SOF by stating that “the need and opportunity to attack or engage strategic or operational targets with small units drive the formation of **special units with specialized, highly-focussed capabilities.**” [bold in original]¹³ The American definitions, therefore, focus on small, specialized units that conduct operations disproportionate to their unit size.

Finally, the Australian military uses yet another series of definitions. Australian joint doctrine defines SO as “highly specialized and focussed operations, executed at the tactical level but designed to achieve operational and strategic effects.”¹⁴ It goes on to add that Special Forces are “specifically selected military personnel, trained in a broad range of basic and specialized skills, who are organized, equipped, and trained to conduct special operations.”¹⁵ The Australian definition uses the effects, vice tasks, of SO in order to define them; they are tactically executed but with impact at the higher levels of war. It further introduces the idea that SOF retain both basic military skills and build their unique abilities upon them.

Given these definitions of SO and SOF, ones that are more developed than those employed by Canada, it is possible to create better CF definitions, allowing for more focussed analysis of both Canada’s current capabilities and the future developments in the integration of SOF and conventional forces. The NATO definition, which Canada

¹³ JP 3-05, II-1.

¹⁴Australia, Department of Defence, ADDP 3.12 *Special Operations* (Canberra: Defence Publishing Service, 2004), Glossary, 5. Hereafter referred to as ADDP 3.12.

¹⁵ ADDP 3.12, Glossary, 4.

has been using, does not address the nature or effects of SO; it describes the forces that conduct them. If elements of the other three definitions are extracted, they can be melded together to form a more comprehensive working definition of SO than is currently being used. McRaven introduces the broad types of operations that make up SO, “destruction, elimination, or rescue.” From the American definition, one can draw the nature of the environment where SO are conducted, as well as their effects at a higher level of war. From the Australian definition, the concept of effects (operational or strategic) can be extracted and applied. Taking all three of these together, a better definition of SO can be proposed for use in this analysis:

Special Operations are those operations conducted in hostile, denied, or politically sensitive environments, executed at the tactical level but designed to achieve operational and strategic effects against targets whose destruction, elimination, or rescue is a political or military imperative.

This defines the nature of the operations that fit SO doctrine. It is also necessary to define the forces that will conduct such operations separate from the role that they fill. A working definition for SOF is proposed:

Special Operations Forces are specifically selected military personnel, organized, equipped, trained and supported in a broad range of basic and specialized, highly-focussed capabilities (special operations), for which there are no broad conventional force requirements.

These are the working definitions of SO and SOF that will be therefore be used throughout the analysis that follows, unless otherwise indicated.

SOF TASKS

To better understand the mission of SOF, the tasks that are broadly referred to above need to be more specifically listed. The definition that the CF currently uses makes reference to missions that are not performed by conventional forces. In order to

determine a need for an SO capability, it is necessary to know the tasks that comprise it.

In this area, American doctrine is specific, and it lists nine core tasks for SOF:

- Direct Action (DA)
- Special Reconnaissance (SR)
- Foreign Internal Defence (FID)
- Unconventional Warfare (UW)
- Counterterrorism (CT)
- Counter Proliferation (CP) of Weapons of Mass Destruction (WMD)
- Civil Affairs Operations (CAO)
- Psychological Operations (PSYOP)
- Information Operations (IO).¹⁶

The Australian doctrine uses a similar list, which includes DA and SR. However, it combines Coalition Support, Humanitarian Assistance, support to IO, training assistance (FID), UW, CP WMD, and liaison together under the title of Support Operations. It also adds Special Recovery Operations (SRO, or hostage rescue) to its task list.¹⁷

Taken together with Government of Canada direction with respect to SOF roles and tasks, the above lists can form the basis for a similar list here. According to *Canadian Forces Operations*, IO and PSYOPS are conducted by conventional forces.¹⁸ However, they will be included here as they are not basic military capabilities. They require uniquely trained elements, even if those elements are not considered SOF. Still, they are relevant for generic doctrinal analysis of SO, since they are executed by some nation's SOF. Likewise, CAO are very similar to Civil Military Cooperation (CIMIC) as defined by Canadian doctrine and are also conducted by specifically trained conventional

¹⁶ JP 3-05, Figure II-2.

¹⁷ ADDP 3.12, 2-1.

¹⁸ *Operations*, 22-1 to 22-3.

forces. Nevertheless, they will also be retained here for comparison purposes. Like their Australian counterparts, Canadian SOF are tasked to conduct hostage rescue, so that too must be added to the list. Finally, the current Defence Policy Statement (DPS) tasks SOF to participate in Non-combatant Evacuation Operations (NEO) and to have the capability to deploy a Joint Nuclear, Biological and Chemical Defence (JNBCD) element.¹⁹ Given all of these factors, a proposed Generic Core Task List, using the American and Australian versions and Canadian policy, for Special Operations Forces is as follows:

SOF GENERIC CORE TASK LIST

Direct Action (DA)

Special Reconnaissance (SR)

Foreign Internal Defence (FID)

Unconventional Warfare (UW)

Counterterrorism (CT)

Counter Proliferation (CP) of Weapons of Mass Destruction (WMD)

Civil Affairs Operations (CAO or CIMIC)

Psychological Operations (PSYOPS)

Information Operations

Special Recovery Operations (SRO)

Non-combatant Evacuation Operations (NEO)

Joint Nuclear Biological and Chemical Defence (JNBCD)

Using the experiences of the U.S., which possesses the largest and most advanced Special Operations Force in the world and is Canada's most significant ally, and blending them with those of Australia, a fellow Commonwealth nation having close military ties to Canada, it is possible to develop new doctrinal statements for Canadian SOF. These definitions of SO and SOF, as well as a Generic Core Task List, will serve a greater analysis of how the CF can improve the interoperability of special and conventional forces in order to meet the government's direction for security in the new millennium.

¹⁹ Department of National Defence, *A Role of Pride and Influence: Defence* (Ottawa: Canada Communications Group, 2005), 13. Hereafter referred to as *Pride and Influence: Defence*.

DOCTRINE, INTEROPERABILITY, AND INTEGRATION

Now that the terms SO and SOF, along with a working task list, have been established, it is necessary to define three other terms that will form the “how” of this analysis: doctrine, interoperability, and integration. The theories and practices of SO can then be applied to a Canadian doctrine of integrating special and conventional forces. The CF use the NATO definition of *doctrine*: “fundamental principles by which the military forces guide their actions in support of objectives. It is authoritative but requires judgement in application.”²⁰ Doctrine is not a set of rules or procedures. It should not contain excessive detail and should be in accordance with Canadian laws, existing policies, and other domestic doctrine.

Doctrine is important to a military as it provides the common basis for force development, force employment, plans, equipment purchases and virtually all aspects of operations. While it is not a rigid guide, its effective development ensures that the elements and forces that make up the CF work together in order to economize resources and possess the capabilities that enable them to meet the defence requirements of the nation.

Despite its importance, the CF have been slow to develop joint doctrine. As of December 2006 all joint doctrine development has been held pending the completion of transformation as the former J7 Doctrine staff, under the Deputy Chief of Defence Staff (DCDS), become part of Chief of Force Development (CFD), working for the Vice Chief

²⁰ Department of National Defence, A-AE-025-000/FP-001 *Canadian Forces Doctrine Development* (Ottawa: DND Canada, 2003), 1-3.

of Defence Staff (VCDS).²¹ This same transformation that delayed doctrine development, however, was also the process that saw the creation of CANSOFCOM. As a result, this new command, with the task to integrate with the other conventional forces, has not received the joint doctrine that it requires in order to be effective. If effective joint doctrine describing the integration of special and conventional forces is developed, it then becomes the springboard for the creation of subordinate single-service doctrine. This, in turn, is used to develop the procedures and techniques that the services will use to support integration of these communities which will, in turn, drive the training for, and conduct of, military operations. Where possible Canadian doctrine should also be compatible with that of its principle allies, especially NATO and the America-Britain-Canada-Australia (ABCA) programme.²²

Since doctrine should be aligned with that of Canada's closest allies, it is necessary to define *interoperability*. NATO defines interoperability as "the ability of Alliances and, when appropriate, forces of Partner and other nations to train, exercise and operate effectively together in the execution of assigned missions and tasks."²³ This is an essential element of Canadian military policy and doctrine and must be considered in any analysis about future changes to either. Since history has shown that it has been rare for Canada goes into a conflict alone, and its defence policy indicates that this trend will

²¹ LCol J.G. Savard, "Briefing to CFC Joint Command and Staff Program" (lecture, Canadian Forces College, Toronto, ON, 15 November 2006), with permission.

²² The American-British-Canadian-Australian Program. This is not a military alliance, but an ad hoc collection of armies with common objectives. See the ABCA *Coalition Partners Handbook*.

²³ North Atlantic Treaty Organization, AAP-6(2004) *NATO Glossary of Terms and Definitions* (NATO: Brussels, 2003), 2-I-6.

continue in the future, its special and conventional forces should, if at all possible, be interoperable with those of its allies.

Finally, SO should be *integrated* with conventional forces. There is neither a NATO nor a CF definition of integration. However, the DPS gives direction as follows: “the Forces will become more *effective* by better integrating maritime, land, air and special operations forces [in order to] deploy the right mix of forces to the right place, at the right time, producing the right result.”²⁴[italics in original] Further to this, CF doctrine states that “the CF is a unified force and, as a matter of routine, conducts operations involving elements of at least two environments.”²⁵ For the purposes of this analysis, integration can be defined as the collective operation of elemental forces (air, land, and maritime), including SOF, in order to achieve the desired military objective.²⁶

SUMMARY

The terms SO and SOF have been defined in a clear and applicable manner, the term doctrine and its importance established, and the concepts of interoperability and integration explained. It is therefore possible to apply this terminology to the Canadian situation in order to determine the need for SOF and, if one exists, the doctrine that must be written in order to ensure that any such force meets the defence needs of the country. These decisions and conclusions can be made after studying the current world security situation and the American and Australian examples.

²⁴ *Pride and Influence: Defence*, 11.

²⁵ *Operations*, 1-6.

²⁶ While the CF has been a single, integrated force since unification, it still uses the term “joint” in order to keep its terminology consistent with that of its allies. *Operations*, i.

“Today’s international security environment poses complex challenges, whether in the form of failed and failing states, global terrorism, the spread of weapons of mass destruction or ongoing regional tensions.”¹

CHAPTER 2 – CANADA’S NEED FOR SOF

While a new version of the Defence Capability Plan² has yet to be released, there are indications that the Government of Canada and the Department of National Defence (DND) desire the future growth of SO capabilities. The latest defence policy document, released in 2004, directed an increase in Special Forces capability.³ While the current Conservative government has yet to issue an update to this policy, released by the previous Liberal government, it has likewise not indicated a withdrawal from this position. When in opposition, Defence Minister O’Connor wrote a letter to a newspaper declaring “JTF2 is an important and necessary part of the Canadian Forces capabilities, which the Canadian Forces will continue to need into the future.” He also stated that the unit would grow in size.⁴ This position was also part of the Conservative Party’s 2006 campaign platform, which called for new spending in all defence areas, including counter-terrorism, a SO task.⁵ The CDS also indicated the importance of SOF, recently stating that JTF2 is “growing their capacity to conduct operations here at home when

¹ *Pride and Influence: Defence*, 6,

² The Defence Capability Plan is to be a government document intended to implement the “Canada First” defence policy that was part of the Conservative government’s 2006 election platform, replacing the policy of the previous Liberal government, *Pride and Influence: Defence*.

³ *Pride and Influence: Defence*, 29-30.

⁴ Gordon O’Connor, “Inaccurate headline,” *The Ottawa Citizen*, 2 January 2006 [journal on-line]; available from www.proquest.com; Internet; accessed 4 April 2007.

⁵ Conservative Party of Canada, *Stand Up for Canada* (2006), 45 [on-line]; available from www.conservative.ca/media/20060113-Platform.pdf; Internet; accessed 2 April 2007.

needed and around the world.”⁶ In sum, the vision of an increased SOF in Canada has become part of the plans of both the CF and the government.

This is not, however, a uniquely Canadian shift in defence planning. When the world-wide defence trends are studied, a move to increased SOF can be seen and Canada is following the examples of its allies as it embarks on a defence plan for the next century. Chief among these are new trends in warfare in the post Cold War era and a rise in the profile of SOF within the militaries of Canadian allies, particularly the U.S. and Australia.

WORLDWIDE TRENDS IN SECURITY

Since the end of the Cold War, the world has seen a rise in low-intensity conflicts. That is not to say that they are any less bloody or tragic than wars in the past. Rather, it is a shift in warfare from large national militaries facing off over a vast battlespace to smaller, often irregular, forces skirmishing in population centres, using their small unit size to conduct asymmetric attacks against conventional militaries, still largely structured according to Cold War requirements. Conflicts such as those in the former Yugoslavia, Somalia, and East Timor are examples of this. Since 11 September 2001, NATO members and U.S. forces have seen their conventional militaries emerge victorious from a short, conventional invasion of Afghanistan, only to become embroiled in long-term irregular and counter-insurgency (COIN) campaigns.

There is a great deal of analysis that indicates that this is the start of new trends in warfare.⁷ The Cold War and the accompanying superpower rivalry had a stabilizing

⁶ Hillier in Campion Smith.

influence on many of the smaller nations of the world or engaged them to battle in proxy wars between the two superpowers. The reduction in status of the former Soviet Union has led to unrest in, and military challenges by, many smaller nations.⁸ The result has been an increase in non-traditional warfare as smaller nations and non-state groups, that cannot win conventional battles against larger armies, are using stealth and surprise to win asymmetric battles against foes that possess numerical and technological advantages.⁹ Against the backdrop of the collapse of the Soviet Union, other nations have emerged in the world, each with their own designs to influence events to their benefit. Whether the issues that create strife are internal or external, when diplomacy and discussion fail, they will frequently turn to conflict to achieve their goals, and the methods that they choose will be unconventional and asymmetric, in order to pit their strength against the weaknesses of larger forces.¹⁰

As the future of warfare changes, the forces that modern or Western nations employ to fight these wars will have to change as well. In many cases, this change is to an increased emphasis on SO. This is not to say that SOF will replace conventional forces. The latter will always exist as long as other, potentially hostile nations, maintain large conventional standing armies. Rather, SOF will find themselves with greater roles

⁷ I have intentionally avoided the use of the term “Revolution in Military Affairs” (RMA), as I do not view the military transformations of the past decade to be a single revolution. Rather, they are one in a centuries-long series of revolutions, making it more of an “Evolution in Military Affairs.”

⁸ William R. Schilling, “Preface,” in *Non-Traditional Warfare : Twenty-First-Century Threats and Responses*, ed. William R. Schilling, (Washington: Brassey’s, 2002), *xiv*.

⁹ Michael Evans, “From Kadesh to Kandahar: Military Theory and the Future of War,” *Naval War College Review* 26, no. 3 (Summer 2003): 38. [journal on-line]; available from <http://proquest.umi.com>; Internet; accessed 5 December 2006.

¹⁰ William R. Schilling, “Threats and Risks in the New Century,” in *Non-Traditional Warfare : Twenty-First-Century Threats and Responses*, ed. William R. Schilling, (Washington: Brassey’s, 2002), 3.

and importance in the next century because they are ideally suited to irregular and asymmetric warfare.

If this trend over the next century holds true, then the future security environment will require forces that are agile, lethal, and adaptable.¹¹ As stated earlier, this need fits the McRaven SOF principles of surprise and speed.¹² SOF meet the need to respond quickly to rapidly changing events. During operations in Afghanistan in 2001, SOF from several nations, including Canada's JTF2, demonstrated a rapid, agile deployment into an asymmetric theatre of operations and were able to bring about the fall of the Taliban government in a few months.¹³ While conventional forces from all three components were involved, it was the lead of SOF and their liaison with Afghans that opposed the Taliban that facilitated this rapid result.¹⁴ This is a very real example of the changes in 21st Century warfare and the strength of SOF as a counter to emerging threats. In a theoretical example, one of the asymmetric threat scenarios often used for defence planning is WMD in the hands of terrorists, whether state sponsored or not.¹⁵ Again, CP of WMD and CT are roles of SOF that were developed earlier. The result has been a rise on the importance of SO and SOF in the U.S., Australia and Canada.

¹¹ Colonel Bernd Horn, "When Cultures Collide: The Conventional Military/SOF Chasm," *Canadian Military Journal* 5 no. 3 (Autumn 2004): 8. [journal on-line]; available from <http://www.journal.dnd.ca>; Internet; accessed 6 December 2006.

¹² McRaven, 8.

¹³ James D. Kiras, "US Special Operations Forces, Transformation, and Implications for Canadian Doctrine," in *Choice of Force: Special Operations for Canada*, ed. David Last and Bernd Horn, 267-285 (Kingston: McGill-Queen's University Press, 2005), 269.

¹⁴ David Last and Bernd Horn, "Preface," in *Choice of Force: Special Operations for Canada*, ed. David Last and Bernd Horn, vii-xiv (Kingston: McGill-Queen's University Press, 2005), ix.

¹⁵ Peter Gizewski, "The Future Security Environment: Threats, Risks and Responses," www.igloo.org/cija/Publications/intern~2; internet; accessed 31 March 2007, 7.

THE RISE OF SPECIAL OPERATIONS IN THE U.S.

While U.S. SOF were in existence during the sixties, seventies, and eighties, the 1991/92 Gulf War saw an increase in SO, a trend that has accelerated since 9/11. This growth in SOF has been in response to the changing international environment. The 2002 *National Security Strategy of the United States* declared that “shadowy networks of individuals can bring great chaos and suffering” and that the “war against terrorists...is a global war of uncertain duration.”¹⁶ Clearly, the U.S. government is predicting a long-term shift in warfare over the next century. This policy has been adopted by the U.S. military; *The National Military Strategy of the United States* calls the challenge posed by irregular warfare one of several “dangerous and pervasive threats.”¹⁷ In the words of the Commander, U.S. Special Operations Command (USSOCOM), “U.S. conventional military dominance encourages future adversaries and competitors – ranging from established nations to non-state groups such as terrorists, insurgents and new and unpredictable extremists – to avoid direct military confrontation with the U.S.”¹⁸ The world is now “characterized by any number of regional issues, international terrorism and operations short of war.”¹⁹

¹⁶ United States, *National Security Strategy of the United States of America* (Washington: U.S. Government Printing Office, 2002): Cover Letter. [online]; available from <http://www.whitehouse.gov/nsc/nss.html>; Internet; accessed 5 September 2002.

¹⁷ United States, *The National Military Strategy of the United States of America* (Washington: U.S. Government Printing Office, 2004): 4. [on-line]; available from <http://www.au.af.mil/au/awc/awcgate/nms/nms2004.pdf>; Internet; accessed 11 December 2006.

¹⁸ Peter J. Schoemaker, “U.S. Special Operations Forces: The Way Ahead,” *Special Warfare* 11, Iss. 1 (Winter 1998): 3. [journal on-line]; available from <http://proquest.umi.com>; Internet; accessed 6 February 2007.

¹⁹ Sam C. Sarkesian and Robert E. Connor, Jr., *The US Military Profession into the Twenty-First Century* (New York: Routledge, 1999), 19.

The response to these future warfare challenges has been an increase in SOF. FID, UW, CT, and CP of WMD are all SOF tasks and collate with the threats facing the U.S. The new face of warfare involves a fast and flexible enemy and the best response to that threat are agile and flexible forces; SOF will have a major, if not the major, role. In this regard, the Commander of USSOCOM has been assigned as the supported commander in the American Global War on Terrorism (GWOT).²⁰ The other unified commanders are in supporting positions. This position is reflected in *The Quadrennial Defense Review*, which reported an 81% increase in the special operations budget between 2001 and 2006.²¹ It also outlined an “increase in SOF capability and capacity,” including raising force levels across all branches of its SOF.²² SO have become an essential part of American military operations.

USSOCOM continues to grow and its forces are becoming a significant part of American military operations in the new security environment. Yet they do not operate alone, they are an integral part of the overall force. While there has been friction between special and conventional forces in the U.S., these are beginning to subside. The schism has been historically caused by competition for the best soldiers and the tendency of SOF to operate outside normal chains of command using unique SO procedures.²³ However, the important lead role that SOF played in Operation ENDURING FREEDOM and the

²⁰ Christopher. Spearin, “Special Operations Forces A Strategic Resource: Public and Private Divides,” *Parameters* (Winter 2006-7): 58. [journal on-line]; available from <http://www.carlisle.army.mil>. Internet; accessed 29 January 2006.

²¹ United States, Department of Defense, *Quadrennial Defense Review* (Washington: U.S. Government Printing Office, 6 February 2006), 44. [online]; available from <http://www.defenselink.mil/qdr/report/Report20060203.pdf>; Internet; accessed 22 March 2007.

²² *Quadrennial Defense Review*, 44-45.

²³ Horn, “When Cultures Collide...,” 6.

priority that they were given by American political leadership have helped to legitimize the existence of SOF in the eyes of conventional commanders.²⁴ General Tommy Franks, for example, was an outspoken critic of the need for SOF in Afghanistan, but by the end of combat operations in IRAQI FREEDOM, he was full of praise for coalition SOF.²⁵ Friction and inter-service rivalry still exist in the U.S. system, but special and conventional forces have learned to integrate so as to meet the needs of the mission, especially as the importance of SOF rises.

THE RISE OF SPECIAL OPERATIONS IN AUSTRALIA

Clearly, the world's hegemon has decided that the future of warfare will see an increased emphasis on conflicts that are best fought with SOF. But the U.S. is also the only remaining superpower with the resources to allocate to all branches of its military. Not all forces have this luxury. As such, Australia provides an example of how another nation, facing similar constraints to those of Canada, views the future of warfare and adapts accordingly.

The last Australian White Paper on defence, released in 2000, declared that “military operations other than conventional war are becoming more common” and that these operations are “an important and lasting trend with significant implications for our Defence Force.”²⁶ This trend is forecast to continue, where “the boundary between a

²⁴ Horn, “When Cultures Collide...,” 3, 14.

²⁵ Horn, “When Cultures Collide...,” 6 and General Tommy Franks, “General Tommy Franks on Coalition Warfare,” *Australian Army Journal* II, no.2 (Autumn 2005): 13.

²⁶ Australia, Department of National Defence, *Defence 2000: Our Future Defence Force*, (2000): VIII. [on-line]; available from <http://www.defence.gov.au/whitepaper/docs/WPAPER.PDF>; Internet; accessed 12 March 2007.

benign situation and open conflict can become blurred.”²⁷ This belief is repeated and expanded upon in the *Foundations of Australian Military Doctrine*, which foresees “a tendency towards greater use of asymmetric and indirect forms of warfare” including terrorism.²⁸ Given the Australian SOF task list that was described earlier and the future tendency towards conflict, the ADF will require the use of SOF for CT, UW, and CP of WMD.

Australia has another important reason to increase the profile of its SOF component. Unlike the United States, which has the military might to act alone if required, the ADF will often be a member of an international coalition, frequently led by the U.S. military. In addition, Australia seeks its security by allying itself with the U.S.²⁹ The Australian White Paper is very clear on this matter. “Our strong alliance with the United States, in particular, is a key strategic asset that will support our bilateral, regional and global interests over the next decade and beyond.”³⁰ Given that the United States sees the future of warfare as requiring robust SOF, it is important that Australia maintain a force similar in capabilities, but scaled to the realities of Australia’s resources. This became evident during Operation ENDURING FREEDOM, the American-led war against the Taliban and al Qaeda in Afghanistan that commenced in the fall of 2001, when the Australian government elected to send SOF elements throughout the campaign

²⁷ *Defence 2000: Our Future Defence Force*, VIII.

²⁸ Australia, Department of Defence, ADDP-D *Foundations of Australian Military Doctrine* (Canberra: Defence Publishing Service, 2002), 3-10. Hereafter referred to as ADDP-D.

²⁹ Major Russell Parkin, “The Realist Tradition of Australian-American Military Relations,” *Australian Army Journal* I, no.2 (December 2003): 129-130.

³⁰ *Defence 2000: Our Future Defence Force*, X.

to operate alongside American SOF.³¹ This line of reasoning will become even more relevant, as ABCA seeks to increase interoperability among its member nations.³² Australian security needs lie in the country's continued close relations with the U.S. Since SOF are becoming increasingly important for American defence, they are becoming more important for Australia, as it seeks to maintain its alliance with the only remaining superpower.

The 21st Century has seen an increase in the profile of Australian SOF, where national defence policy recognizes the changing world situation and the increasing likelihood of asymmetric and irregular wars. As well, Australia recognizes at all levels that the key to its security is alliance and cooperation with the U.S., which has increased its own SO capability. Given that Canada is in a similar situation with respect to its relations with the U.S., there are lessons that can be learned from the Australian example.

THE NEED FOR SOF IN CANADA

The need for an increased SOF component in Canada is similar to that of the United States and Australia. Canada's policy statement on defence makes the government position on the future of conflict very clear. "Failed and failing states dot the international landscape...terrorism has become a deadly adversary...and Canadians are now, in some ways, more threatened than at any time during the Cold War."³³ Among the threats that the statement predicts for the coming years are terrorism, failed states

³¹ Captain Malcolm Brailey, *The Transformation of Special Operations Forces in Contemporary Conflict: Strategy, Missions, Organisation and Tactics* (Duntroon Australia: Land Warfare Studies Centre, 2005), 24.

³² General Richard A. Cody and Lieutenant Colonel Robert L. Maginnis, "Coalition Interoperability: ABCA's New Focus," *Military Review* 86 Iss. 6 (November-December 2006): 65. [journal on-line]; available from <http://proquest.umi.com>; Internet; accessed 21 January 2007.

³³ *Pride and Influence: Defence*, 1.

providing a home for asymmetric adversaries, and the proliferation of WMD; all requiring SO capabilities to counter. As mentioned earlier, while there has been no new policy statement since the change in government in 2006, there have been media releases and government announcements and these have further defined the strategic need for SOF.

This belief is further reflected in the Department of National Defence (DND) *Strategic Assessment 2004*, which declared that, since 11 September 2001, “asymmetric threats are now the norm against which Western strategists must work.”³⁴ As with the examples of the U.S. and Australia, Canada’s needs for defence are in line with the proposed Generic Task List for Canadian SOF. UW, NEO from failing states, the CP of WMD, CT, and the provision of Joint NBCD are all SOF roles that will be required for the future.

Unlike the American and Australian examples, however, Canadian military documents have been very thin on the requirements for SOF. The need recognized by two successive, and opposing, governments has not been translated into policy or doctrine. The VCDS Group, which has the responsibility for long-term planning and capability development, has issued several lengthy reports about the future security environment, including *Canadian Defence Beyond 2010*, and *Future Security Environment 2025*. However, these are primarily theoretical documents that address Canada’s security needs in the coming decades. They do not provide the military with direction or a doctrinal foundation for the development of SO capabilities and integration

³⁴ Department of National Defence, “Functional Issues,” *Strategic Assessment 2004* (Ottawa: DND Canada, 2004): 9. [online]; available from www.forces.gc.ca/admpol; Internet; accessed 12 December 2006.

of SOF. Canada stood up CANSOFCOM in 2006, as part of CF Transformation, the CDS' vision to shift defence priorities from the "bear" (hostile nation states such as the former Soviet Union) to the "snakes" (non-state actors practicing asymmetric warfare).³⁵ Despite this direction from the highest levels, the CF still do not have effective doctrine regarding SOF.

Like the ADF, the CF are likely to be a member of a multi-national coalition when they deploy outside of their homeland. In most cases, the leader of that coalition will be the United States. This is recognized in *Strategic Assessment 2005*, which dedicates an entire chapter to "The Anglosphere at War."³⁶ In this analysis, the U.S. is clearly the leader of this collection of like-minded nations (notwithstanding the refusal of Canada and New Zealand to join the Iraq war in 2003). If Canada is to continue to participate in such coalitions, it must be fully interoperable with other such nations, as far as resources allow, and this includes the ability to participate in SO. The CF are doing this at the tactical, and possibly operational, levels of war as demonstrated by the deployment of JTF2 to Afghanistan for Operation ENDURING FREEDOM.³⁷ However, Canadian national doctrine of SOF integrated with conventional forces and able to operate with allied forces, especially the U.S. military, has yet to surface.

SUMMARY

The global face of conflict is changing away from conventional warfare, with national militaries pitted against one another in the battlespace, to an era of increased

³⁵ General Rick Hillier, "Setting Our Course: The Way Ahead for Our Canadian Forces," http://www.cds.forces.gc.ca/00native/pdf/cds-vision_e.pdf; Internet; accessed 12 March 2006.

³⁶ Anglosphere refers to the nations of ABCA plus New Zealand. See *Strategic Assessment 2005*, 52-60.

emphasis on irregular and asymmetric fighters, from both state and non-state actors. These new groups will use the advantages of their small size and irregular tactics to challenge the large Western militaries in future wars. Canada's largest ally, the United States, has learned these lessons, and has begun to transform its military to increase the emphasis on SO and to integrate SOF into the spectrum of options that it has when facing military challenges. The ADF, in a similar situation to that of the CF, has already established a Special Operations Command and have implemented the necessary doctrine that sees SOF able to face the new threat, integrated with its conventional arms and interoperable with American forces. The CF have acknowledged these new realities, but have only recently formed CANSOFCOM and have yet to build upon the strategic direction that they received from the government and the CDS. If the CF are to remain effective and relevant in the future, it is important that they take their own actions to integrate SO and SOF into their force structure.

³⁷ David Pugliese, *Shadow Wars* (Ottawa: Esprit de Corps Books, 2003), 99-116.

“We now can see that capabilities such as SOF are the secure handholds that will take us through the turbulence of asymmetric threats, but we hesitate to drop the old and trusted handholds of our current force structure.”¹

CHAPTER 3 – CANADA’S CURRENT SOF POLICY & DOCTRINE

It is clear that Canada, like its allies, has a need for a SO capability, including dedicated SOF. This has been directed by the government in a series of defence documents and has been included in CDS’s vision for the future of the CF. Yet, regardless of this high-level direction and support, Canadian policy in this area is nearly non-existent. This is the case at the strategic and operational levels, those levels at which effective integration must occur if it is to translate into mission success.

CANADA’S DEFENCE POLICY

The highest level defence document in Canada is the DPS; a virtual White Paper on defence that is part of a series of publications addressing Canada’s international policy. The document is divided into three broad areas: Protecting Canada and Canadians; the Canada-U.S. defence relationship; and contributing to a safer and more secure world. Each of these areas has general tasks for the CF, including SOF and the three environmental forces (maritime, air, and land). Even though these tasks are meant to be general in nature and not a specific list, they do not adequately address the use of SOF and their integration with conventional forces, even though the government has clearly articulated this need in its description of the current strategic environment.

This defence policy recognizes the changing face of warfare in the 21st Century. Its defence requirements are in accordance with those seen as SO by theorists and

¹ LCol Jamie Hammond, “Special Operations Forces: Relevant, Ready, Precise,” *Canadian Military Journal* 5 no. 3 (Autumn 2004): 27. [journal on-line]; available from <http://www.journal.dnd.ca>; Internet; accessed 6 December 2006.

Canada's allies. Even within failed and failing states, the threat to Canada is that they are often "potential breeding grounds or safe havens for terrorism and organized crime."²

While crime is a matter for police within the Canadian security construct, dealing with terrorist threats abroad is a task for SOF. Given that SOF are the desired force for dealing with 21st Century threats, the government defence policy gives some direction, albeit thin, for the future development of this capability.

Under the banner of Protecting Canadians, there are only three tasks assigned to SOF: national CT response (JTF2); enhancing the Joint NBCD Company; and providing SO expertise to other task forces.³ All of these tasks were assigned to the CF prior to 2005 and included no additional capabilities for SOF. This is in spite of the recognition that "we cannot – and will not – relax our efforts to combat terrorism."⁴ There is also only a general reference to integration as part of A New Vision for the Canadian Forces in order to increase its effectiveness against these threats.⁵ Against this statement of vision, it does not translate into tasks for either the SOF or for any of the environmental commands.

There is even less governmental direction for SOF under the section on the Canada-U.S. Defence Relationship. It recognizes the U.S. as "Canada's most important ally...Our defence and security relationship is long-standing."⁶ The document adds that "it is clearly in our sovereign interest to continue doing our part in defending the

² *Pride and Influence: Defence*, 5.

³ *Pride and Influence: Defence*, 18-19.

⁴ *Pride and Influence: Defence*, 16.

⁵ *Pride and Influence: Defence*, 11.

⁶ *Pride and Influence: Defence*, 21.

continent with the United States.”⁷ But this recognition is not reflected in the continental defence tasks, which leave out SOF, and instead focus more on air and maritime forces, despite the trend in the U.S. to an increased reliance on SOF.

One of the transformation tasks directed in the DPS that has come to fruition is the creation of a Special Operations Group. The task of this formation is to “respond to terrorism and threats to Canadians and Canadian interests around the world.”⁸ On 1 February 2006 CANSOFCOM was stood up, meeting the mandate of the DPS. It is comprised of a headquarters, JTF2, 427 Special Operations Aviation Squadron (427 SOAS), the Canadian Special Operations Regiment (CSOR), and the JNBCD Company.⁹ This brings the command and control of CF SOF into line with that used by USSOFCOM and ADF Special Operations Command; a single commander responsible for the force employment and generation of SOF. As well, the Commander of CANSOFCOM is responsible for providing SO expertise to the Government of Canada, the CDS, and the commanders of the other operational commands.¹⁰ At the strategic level, Canada has recognized the need for SOF and has directed some of the tasks required for their development. What has yet to be addressed, at the highest levels, is the doctrinal integration of SOF and conventional forces. This is clearly evidenced in *Canadian Forces Operations* that states only “under development” for the chapter entitled Special Operations Forces.¹¹

⁷ *Pride and Influence: Defence*, 21.

⁸ *Pride and Influence: Defence*, 13.

⁹ http://www.cansofcom.forces.gc.ca/en/index_e.asp.

¹⁰ Barr, “SOF Doctrine Brief.”

¹¹ *Operations*, 29-1.

CANADIAN ELEMENTAL DOCTRINE

Canadian Army Doctrine

The DPS provides some direction to the land forces for the integration of SOF. It gives broad tasks aligned with the three areas of defence policy. Under Protecting Canadians, the land forces are tasked to “provide forces to the Special Operations Group for domestic operations.”¹² No direction is provided for land forces and SOF to work together with respect to the Canada-U.S. defence relationship. However, a very clear task is provided for international operations. As part of Contributing to a Safer and More Secure World, the land forces are to “provide light forces to support the Special Operations Group, capable of integrating with Joint Task Force 2 elements.”¹³ This is an unambiguous task that speaks to the requirements in a future conflict.

This has led to reasonably well developed Army doctrine with respect to SO, especially at the operational level. The keystone document for land operations is *Conduct of Land Operations* and it contains thorough descriptions of SO and SOF, and their place in the battlespace. It lists the tasks that SOF may be ordered to perform, and their role in conducting operational manoeuvre. It also describes, in general terms, the optimum command and control arrangements for SOF employed with conventional forces. Most importantly, it alludes to the cooperation and integration of these two types of forces: “special forces operations. . . must be coordinated with tactical conventional operations.”¹⁴ So while strategic direction to govern the integration of SOF is lacking, at

¹² *Pride and Influence: Defence*, 20.

¹³ *Pride and Influence: Defence*, 31.

¹⁴ *Conduct of Land Operations*, 55-56.

the operational level the Army already recognizes its importance on the modern battlefield and has moved ahead on the issue.

Canadian Navy Doctrine

Like the Army, the DPS provides tasks for the integration of the Navy with SOF. Again, these tasks are clear. As part of A New Vision for the CF, the maritime forces are tasked to “enhance the ability of their ships to support the Special Operations Group...”¹⁵ Under Protecting Canadians, a similarly clear, although limited, task is offered: “provide, when required, submarines in direct support of the Special Operations Group for operations within Canada’s oceans.”¹⁶ There is, however, no similar task to provide surface ships to support SO in a domestic environment, even though the Navy features prominently in Canadian and continental defence. Finally, as part of the chapter on contributing to a safer world, the maritime forces have a clear task: “sustain indefinitely the deployment overseas of...a submarine and a ship, for operations in direct support of the Special Operations Group...”¹⁷

Unlike the Army, however, the Navy has not “hoisted aboard” these tasks in the development of future capabilities. In response to the DPS, the Chief of the Maritime Staff (CMS) re-issued its capstone document, *Leadmark*, as *Charting the Course from Leadmark*. It describes a requirement to enable sea-based joint operations, including support to SOF, but does not apply these tasks to its concepts of operations. It does describe the suitability of patrol submarines to operate with SOF, one of the tasks of the

¹⁵ *Pride and Influence: Defence*, 14.

¹⁶ *Pride and Influence: Defence*, 19.

¹⁷ *Pride and Influence: Defence*, 30.

DPS, but does not make the same statements about its other fleets.¹⁸ While it discusses support to land operations, it does so only with respect to sealift and logistical support, not to conducting operations with land or SOF. This is also true of the description of the Single Class Surface Combatant (SCSC), the proposed replacement for the older destroyers and frigates, which do not address integrated support to SO, contrary to direction from the government to do so. Even though the document lists Maritime Interception Operations (MIO) and NEO as doctrinal roles, and both may require SO, the CMS has not specified the integration of SOF into its combat fleet, with the exception of submarines.

Canadian Air Force Doctrine

Like the other environmental components, the Air Force was tasked to change in response to the new security environment. It also received specific tasks related to SO. As part of A New Vision for the CF, new aerospace capabilities included direction “to acquire medium-to-heavy lift helicopters, to support land and special operations...”¹⁹ Under Protecting Canada, the Air Force was tasked to “provide a special operations aviation capability to the Special Operations Group for operations anywhere in Canada.”²⁰ This capability was extended to the international arena, as the Air Force was tasked to “provide a globally deployable special operations aviation capability to the

¹⁸Department of National Defence, B-GN-007-000/AG-001 *Securing Canada's Ocean Frontiers: Charting the Course from Leadmark* (Ottawa: DND, 2005), 43.

¹⁹*Pride and Influence: Defence*, 14.

²⁰*Pride and Influence: Defence*, 20.

Special Operations Group.”²¹ As with the other forces, there were no tasks related to aerospace capability with respect to the Canada-U.S. Defence Relationship.

Almost despite its doctrine, however, the Air Force has managed to begin to meet some of these tasks. The current capstone document for the Chief of the Air Staff (CAS) is *Canadian Forces Aerospace Doctrine*, which was released in 2006, replacing *Strategic Vectors*. Neither document refers to SO or SOF, nor Air Force support to them, even though *Aerospace Doctrine* was written after the direction received in the DPS.²² It grew 427 Tactical Helicopter Squadron (THS), with a single flight supporting SO, into 427 SOAS, in order to meet the domestic requirement.²³ This unit is not globally deployable, however, and only meets the remit to provide SO aviation support within Canada.²⁴ As well, procurement has begun on a new medium-to-heavy lift helicopter (MHLH), likely to be the Boeing H-47 Chinook.²⁵ There is still no doctrinal direction to the Air Force regarding the integration of its capabilities with those of SO, except for the SOAS, even though the prime method of moving SOF with Canada, North America, or the world will be via CF airlift. As well, there is no direction regarding the integration of other platforms’ capabilities (for example CP-140 Aurora, CH-124 Sea King or its replacement, the CH-148 Cyclone). So while there have been individual initiatives that meet the direction provided by the DPS, there have been no doctrinal changes at the

²¹ *Pride and Influence: Defence*, 30.

²² Department of National Defence, B-GA-4000-000/FP-000 *Canadian Forces Aerospace Doctrine* (Ottawa: DND Canada, 2006).

²³ Chief of the Air Staff, CANAIRGEN 004/06, Impact of CF Transformation on Air Command – February Update (CAS 005 101800Z Feb 06).

²⁴ http://www.cansofcom.forces.gc.ca/en/index_e.asp

strategic or operational levels that integrate the capabilities of the Air Force with those of SO.

SUMMARY

In Canada, some of the new security reality has been absorbed, especially since the hijackings of 11 September 2001 brought the fight to North America. This has been captured in the DPS directing the CF to begin the required transformation. The current CDS has recognized this as well, as he marked the shift in the enemy from the “bear” of other nations to the “snake” of non-state actors. The re-organization of the CF saw the creation of CANSOFCOM, with dedicated SO and support units. However, the CF have been slow to adapt to this new reality. Strategic doctrine is non-existent, as is joint operational doctrine. Within the three service environments there are similar gaps. The Navy has made a few changes, especially with the recognition of submarines as a SO platform. However, there have been no moves to integrate the capital ships with SOF interoperability, contrary to DPS direction to develop an international SOF support capability. The Air Force has been similarly lacking, especially in its doctrine development. 427 SOAS meets part of its requirement for aviation support, but is still only domestic. The remainder of the fleets have no direction to integrate their operations with those of SO. Only when SO becomes a seamless part of the spectrum of force available to operational or strategic commanders will Canada truly be capable of operations in this new age.

²⁵ Chief of the Air Staff, CANAIRGEN 026/06, Designation of Medium-to-Heavy (MHLH) Main Operating Bases (MOBS) (CAS 043 071735Z Sep 06).

“Special operations have become an integral part of a theatre campaign across a range of military capabilities.”¹

CHAPTER 4 – U.S. SOF DOCTRINE

As the world leader in the development of SO and SOF, the United States provides an excellent example upon which Canada can base its SO and SOF doctrine. This is particularly true in the area of integration between special and conventional forces. The American military has developed its expertise from the experiences that it had in Vietnam, in SO during the Cold War, and in military operations since the collapse of the former Soviet Union. By capturing lessons from its experience and applying them across all three services, and developing a combatant command system that allows for optimum force employment and generation, the American military has become the standard by which most Western forces measure their SOF capabilities.²

HISTORY

As written earlier, American SO came to the fore during the Kennedy Administration for both political and military reasons. While there were many small scale SO operations and activities throughout South East Asia during the Vietnam War, the 1970 raid on Son Tay was to be the first large, joint SO since WWII.³ It involved U.S. Army (USA) SOF, U.S. Air Force (USAF) fixed and rotary wing aircraft and U.S. Navy (USN) carrier based strike aircraft, which conducted a coordinated assault to rescue American prisoners of war (POW) from a North Vietnamese prison camp. The mission

¹ United States, Department of Defense, *JP 3-05 Doctrine for Joint Special Operations* (Washington: U.S. Government Printing Office, 2003), vii. Hereafter referred to as JP 3-05.

² The United States Marine Corps SO capability will not be examined, as there is no comparable arm in Canada and because until 2006 its Marine Special Operations Command (MARSOC) was not integrated with USSOCOM.

³ McRaven, 287.

was extensively planned, training and rehearsals with all elements in both the United States and Thailand were conducted, and the mission was well-understood by all participants.⁴

In the end, the mission was both a success and a failure. It was a success in that the insertion and extraction of the SOF were accomplished according to the plan, and without any loss of life.⁵ However, Son Tay was a failure in that there were no prisoners in the camp at the time of the operation, so it failed to meet the mission aim of rescuing the POW.⁶

There were many lessons learned regarding the interoperability and integration of special and conventional forces, particularly with respect to air and aviation assets.⁷ The six McRaven principles of SO were applied successfully, and the SOF and the supporting forces performed exactly as planned and rehearsed, especially the USN and USAF forces that provided air power and deception operations. Key to this success, was the integration achieved by having all the participating organizations involved in planning and practicing the mission.⁸ Sadly, many of these lessons would be lost over time, resulting in one of the most spectacular SO failures in the modern era.

In April 1980, Army (USA) SOF, in concert with the U.S. Marine Corps (USMC), USAF and USN resources, attempted to rescue American hostages in Iran.

⁴ McRaven, 302-309.

⁵ Colonel John T. Carney, Jr. and Benjamin F. Schemmer, *No Room for Error: The Covert Operations of America's Special Tactics Units from Iran to Afghanistan* (New York: Ballantine, 2002), 44.

⁶ McRaven, 318.

⁷ McRaven, 305-306.

⁸ McRaven, 319-320.

These citizens had been seized during the overthrow of the Shah of Iran in the fall 1979 and could not be freed by negotiations as relations between the America and Iran collapsed. In the spring of 1980, U.S. SOF leaders proposed a daring rescue to free the hostages in Tehran. The mission would be composed of the newly formed Delta Force, USMC helicopters, USAF airlift, and aircraft from the USN.⁹ The mission was poorly planned, not fully rehearsed, and did not integrate the strengths of all services involved.¹⁰ Since the SOF elements lacked their own helicopters, especially those large enough to carry the assault force over a long distance, USN helicopters were assigned to the mission. USN pilots, however, lacked the over-land flying skills to safely operate over the Iranian desert at night and were replaced by USMC pilots with the requisite skills. Their problem, however, was that they had never flown the USN aircraft.¹¹ All the elements conducting the operation were performing tasks that they had never trained to do. In the end, the mission was “as inelegant as a Rube Goldberg contraption, with parts borrowed from everywhere.”¹² The result was the infamous Desert One accident in which a USAF C-130 and a USN H-56 (being flown by USMC pilots) collided at an ad hoc refuelling point in the Iranian desert, killing eight personnel and aborting the operation prior to the attempted rescue of the hostages. This spectacular failure caused the U.S. military to re-examine its emphasis, or lack thereof, on SO.¹³

⁹ Mark Bowden, *Guests of the Ayatollah* (New York: Atlantic Monthly Press, 2006).

¹⁰ Camey and Schemmer, 98-100.

¹¹ Bowden, 227-228.

¹² Bowden, 231.

¹³ Bowden, 595.

The indirect result of this failure was the creation of USSOCOM in November 1986 as part of the Goldwater-Nichols Department of Defence Reorganization Act.¹⁴ The aim of this act, and the creation of the combatant commands, was to improve joint interoperability and procedures, especially with respect to SOF. At the activation ceremony for USSOCOM, Admiral William Crowe, Chairman of the Joint Chiefs of Staff (CJCS), spoke the words that have guided the integration of SOF and conventional forces ever since:

First, break down the wall that has more or less come between Special Operations Forces and other parts of our military...[s]econd, educate the rest of the military; spread a recognition and an understanding of what you do, why you do it, and how important it is that you do it. Last, integrate your efforts into the full spectrum of military capability.¹⁵

Given this direction by the CJCS, the U.S. military has addressed the issue of Operational Security (OPSEC). As will be seen, this has been done through the development and implementation of effective doctrine, including the use of SOF liaison staff across all commands. While there were still some problems caused by the misuse of OPSEC in Afghanistan,¹⁶ these lessons were learned in that theatre and overcome in Iraq.

U.S. JOINT SOF DOCTRINE

The United States military has developed a great body of SO and SOF doctrine, both joint and single service. The strategic level publication is JP 3-05, *Doctrine for Joint Special Operations*, which provides clear direction to combatant, subordinate and

¹⁴ William G. Boykin, "A Joint Staff Perspective on Emerging SOF Roles and Missions," in *Roles and Missions of SOF in the Aftermath of the Cold War*, ed. Richard H. Schultz, Jr., Robert L. Pfaltzgraff, Jr. and W. Bradley Stock, 209-214 (Tampa: USSOCOM, 1995), 209.

¹⁵ Admiral William J. Crowe, Jr. in Boykin, 209.

¹⁶ CDR Steven R. Schrieber, LTCOL Greg E. Metzgar and MAJ Stephen R. Mezhir, "Behind Friendly Lines: The Need for Training Joint SOF Staff Officers," *Special Warfare* 16, no. 3 (Feb 2004): 45. [journal on-line]; available from <http://proquest.umi.com>; Internet; accessed 4 December 2003.

component commanders on the conduct and integration of SO. As such, it is the document upon which all other SO doctrine builds. In its opening chapter, it clearly lays out the importance of the integration of SOF and conventional forces:

SO are an **integral part of theater campaigns**. While SO can be conducted unilaterally in support of specific theater or national objectives, **the majority of SO are designed and conducted to enhance the likelihood of success of the overall theater campaign. SO must complement – not compete with nor be a substitute for – conventional operations.** [bold in original]¹⁷

The publication goes on to add that, “although they may be conducted as a single-Service operation, most are planned and executed as a joint operation. SO routinely require joint support and coordination.”¹⁸ American doctrine is clear, therefore, about the importance of mixing of SOF and conventional forces.

U.S. joint doctrine also sees SO as taking place across the spectrum of operations, not just in war. “SO can be conducted across the range of military operations at all levels of war and throughout all phases of a joint campaign.”¹⁹ SO may also be used in Military Operations Other Than War (MMOTW), where they “are often conducted outside the United States with the overarching objectives of deterring war and promoting peace...Especially when conducted outside the US, SO may be the best means of achieving certain objectives...”²⁰ To elaborate on this, the joint doctrine further outlines a core task list, which was given in an earlier chapter. All of these tasks can be undertaken anywhere there along the spectrum of conflict. However, the doctrine is also clear on the purpose of SOF. “SOF are not a substitute for conventional forces, but a

¹⁷ JP 3-05, I-1.

¹⁸ JP 3-05, I-2.

¹⁹ JP 3-05, I-3.

²⁰ JP 3-05, I-4.

necessary adjunct to conventional capabilities...SOF should not be used for operations whenever conventional forces can accomplish the mission.”²¹ SOF work with conventional forces, in U.S. doctrine, to ensure a continuum of options across the spectrum of conflict.

Since special and conventional forces will work together, either in supporting or cooperating roles, it is important that the Command and Control (C2) of SOF be clearly delineated for commanders at all levels. Command of USSOCOM is assigned to a full general. Domestically, “all SOF based in the continental United States are assigned to USSOCOM and are therefore under the combatant command (command authority)(COCOM) of the Commander, USSOCOM.”²² Command and Control of SOF in a theatre of operations is similarly well-defined. “Normally, C2 of SOF should be executed within the SOF chain of command.”²³ This is accomplished by the designation of a Theatre Special Operations Command (TSOC) Commander, who can act as a Joint Force Commander (JFC), a Theatre SO Advisor, or as a Joint Force Special Operations Component Commander (JFSOCC) depending on the theatre organization and the mission to be accomplished.²⁴ Finally, in order to ensure that subordinate commanders make effective use of SOF resources, and that they are not misemployed, SO liaison staff are assigned to the component commanders. The work of these staffs, which assume different titles depending on the component that they are assigned to, is considered

²¹ JP 3-05, II-2.

²² JP 3-05, III-2. COCOM is the American term that is analogous with Full Command, as defined in *Canadian Forces Operations*.

²³ JP 3-05, III-3.

²⁴ JP 3-05, III-4.

“crucial to maintaining the JFC’s unity of effort, tempo, and coordination of limited resources and assets” by ensuring “the timely exchange of necessary operational and support information.”²⁵ This emphasis on liaison addresses the problems caused by excessive OPSEC by having SOF officers embedded in other headquarters to advise the conventional force commanders of SO in the battlespace and ensuring cooperation and deconfliction. The final area that 3-05 thoroughly covers is support of SOF. Since they are by their nature light forces, this has an increased importance. To that end, the doctrine clearly lays out the responsibility for all types of support, from logistical to medical to legal and public affairs.²⁶ Command and Control, liaison and the responsibility for support form important elements of the effective integration of SOF and conventional forces and are therefore clearly laid out in U.S. joint doctrine.

USSOCOM DOCTRINE

At the operational level, the Commander of USSOCOM released the *Capstone Concept for Special Operations (CCSO)* in 2006. As a subordinate document to 3-05, the *CCSO* expands on the higher level doctrine. The important themes remain. “Joint SOF can best wage protracted irregular warfare by building partner capacity, influencing stability, and developing operational and intelligence networks within important areas.”²⁷ The roles of commanders are also identified, as “USSOCOM must strive to develop Joint SOF leaders who understand the operational and strategic capabilities of joint

²⁵ JP 3-05, III-11.

²⁶ JP 3-05, Chapter IV.

²⁷ United States, United States Special Operations Command, *Capstone Concept for Special Operations* (Tampa: USSOCOM, 2006): 6. [Online]; available from <http://www.au.af.mil/au/awc/awcgate/awcgate.htm>; Internet; accessed 3 December 2006.

conventional, interagency, coalition, and non-governmental organizations.”²⁸ As a combatant commander, USSOCOM is responsible for the both the force generation and force employment of the assigned forces, like any of the other regional commanders, and as such has the authority for “SOF preparation, equipping, training, and individual career development.”²⁹ Given this mandate for force generation, USSOCOM is able to develop forces that are in line with the stated requirements of interoperability and integration with conventional forces, as well as non-governmental agencies and coalition members in order to remain in a leading, and effective, role in the non-conventional wars of the 21st Century. The document also addresses the problematic area of OPSEC. It directs USSOCOM to “reduce artificial barriers to sharing classified information.”³⁰

U.S. SERVICE DOCTRINE FOR SOF

United States Air Force

The USAF maintains its own cadre of Special Operations personnel, referred to as Air Force SOF (AFSOF). Accordingly, it has included SO in its doctrine at all levels. *Air Force Basic Doctrine* is the capstone document for USAF operations. In it, one of its key organizational functions is “to organize, train, equip, and provide forces for the support and conduct of special operations...”³¹ At a basic level, the USAF understands that it must integrate itself with SOF. The document goes on to add SO as one of 17 key operational functions, with AFSOF “organized and employed in small formations capable

²⁸ *Capstone Concept for Special Operations*, 6.

²⁹ *Capstone Concept for Special Operations*, 6.

³⁰ *Capstone Concept for Special Operations*, 8.

³¹United States, AFDD1 *Air Force Basic Doctrine* (Washington: Department of the Air Force, 2003), 37-38. Hereafter referred to as AFDD1.

of independent, supported, and supporting operations, with the purpose enabling timely and tailored responses across the range of military operations.”³² The definition then expands upon that provided in 3-05, adding the detail necessary to separate Air Force SO from Joint SO and to specify the integrated support functions. To further improve upon this, the USAF has issued its own SO doctrine manual, Air Force Doctrine Document 2-7 *Special Operations*. This document clearly spells out, at the strategic and operational levels, the relationships between SOF and conventional forces.

United States Navy

The USN has issued its doctrine over a series of six publications. The lead in the series is Naval Doctrine Publication 1 (NDP1) *Naval Warfare*. Although published in 1994, well ahead of the events of 2001, it still addresses the issue of USN SO. It lists combating terrorism – an SO core task – as one of its principle roles with Operations Other Than War (OOTW).³³ Later, in the Chapter entitled “Into the 21st Century,” the doctrine is prescient in its listing of Special Warfare Forces as a method of power projection. It defines them as forces that are “capable of operating clandestinely, are task organized to provide advance-force operations, hydrographic and near-shore reconnaissance in advance of landing, direct-action missions, combat search-and-rescue missions, and the ability to degrade enemy lines of communications.”³⁴ While this doctrine was written for the USN SEa-Air-Land (SEAL) Teams, it already has the form of the core task list that is now in use for U.S. joint SO.

³² AFDD1, 53.

³³ United States, NDP1 *Naval Warfare* (Washington: Department of the Navy, 1994), 22. Hereafter referred to as NDP1.

³⁴ NDP1, 66.

NDP1 was updated in 2003 by the release of “Naval Operating Concept for Joint Operations.” This capstone document took the direction from the *National Security Strategy* and the two years of war in Afghanistan, and updated its concepts for integration with SOF. In order to conduct joint sea-based operations, the document states that “Sea Strike capabilities...will be increasingly integrated with complementary capabilities of the Air Force, Army, and Special Operations Forces.”³⁵ As well, the USN plans to use its seaborne assets as a basing option for SOF, providing increased support, force protection, and less reliance on host nations.³⁶ The plans for the USN could not be more clear, as the document concludes “we are committed to achieving maximum interoperability and complementarity [sic] with the Army, Air Force, Coast Guard, and Special Operations Command in future joint operations.”³⁷

U.S. Army

The US Army is the largest generator of SOF for USSOFCOM, supplying approximately 60 percent of SOF personnel.³⁸ As such, it has SO fully integrated into its basic doctrine. The keystone document for the USA is FM 3-0 *Operations*. It includes Army SOF (ARSOF) as an integral part of the land component of a joint force, fulfilling all of the core tasks.³⁹ More importantly, it includes SO as a part of unified action,

³⁵ United States, United States Navy, *Naval Operating Concept for Joint Operations* (Washington, DC: U.S. Government Printing Office, 2003), 9. [online]; available from <http://www.nwdc.navy.mil/Conops/NOC.pdf>; Internet; accessed 11 March 2006.

³⁶ *Naval Operating Concept for Joint Operations*, 5,12.

³⁷ *Naval Operating Concept for Joint Operations*, 22.

³⁸ United States, United States Special Operations Command, *Posture Statement 2006: United States Special Operations Command* (Tampa: USSOCOM, 2006), Table 1. [on-line]; available from <http://www.socom.mil>; Internet; accessed 21 January 2007.

³⁹ United States, United States Army, FM 3-0 *Operations* (Washington: Department of the Army, 2001), 1-7. Hereafter referred to as FM 3-0.

linking all available resources under a single combatant commander. This commander operates with other agencies, military and civilian, in the battlespace in order to accomplish the mission. In the doctrine of the US Army, ARSOF can provide capabilities that can “complement conventional forces,” or “support the theater campaign or major operations of the JFC.” Further, ARSOF can be employed across the spectrum of operations, and have roles in stability operations, support operations, or assisting other U.S. government agencies.⁴⁰ As would be expected by a force with an SO capability of over 33,000 active duty personnel, the US Army has SOF well integrated with its conventional forces and is able to provide a continuum of options across the spectrum of conflict in order to respond to the new wars of this century.

SUMMARY

The impact of American doctrine development and the resulting effective integration was seen in Operation IRAQI FREEDOM. While historically American senior leaders, including Generals Norman Schwarzkopf and Tommy Franks, were doubtful, and at times even hostile, about the abilities of SOF, recent conflicts in Afghanistan and Iraq have begun to shift this opinion.⁴¹ Testifying before the Senate Armed Committee on 9 July 2003, General Franks clearly expressed his support for the integration of SOF into the commander’s force:

Our forces were able to achieve their operational objectives by integrating ground manoeuvre, special operations, precision lethal fires and non-lethal effects. We saw for the first time integration of forces rather than deconfliction of forces. This integration enabled conventional (air, ground, sea) forces to leverage SOF capabilities to deal effectively with asymmetric threats and enable precision

⁴⁰ FM 3-0, 2-8, 2-9.

⁴¹ Horn, “When Cultures Collide...” 14.

targeting simultaneously in the same battle space. Likewise, Special Operators were able to use conventional forces to enhance and enable special missions.⁴²

The scepticism that followed the failure of Operation EAGLE CLAW in Iran has been replaced in the U.S. military with a healthy respect and understanding for the role of integrated SOF.

As one would expect from the world's leader in SOF, the United States has very well developed doctrine in the field. Starting with a strategic level document that clearly defines the joint capabilities and expectations from commanders at all levels, down to operational doctrine for each of the individual services, U.S. military doctrine stresses the effective importance of SO as part of the spectrum of operations. In between, the operational command for all SOF, USSOCOM, has developed clear guidance for the employment and generation of this capability, especially when it is provided to other combatant or task force commanders. Throughout all of these documents, two clear themes emerge. The first is that SO are joint. They are conducted by all elements and use the support capabilities that can be provided by each element in order to accomplish the national mission. Second, SOF are integrated with conventional forces at all levels. Integration allows both organizations to function effectively to achieve success. These valuable lessons were learned through SO mission successes and failures and are being well applied in the new face of warfare. The CF can learn from others, a much less painful way to learn the lessons of warfare than from their own mistakes.

⁴² General Tommy R. Franks, "Statement of General Tommy R. Franks Former Commander US Central Command Before the Senate Armed Services Committee," www.au.af.mil/au/awc/awcgate/congress; Internet; accessed 10 April 2007.

“The Australian Army is an irregular warfighting Army.”¹

CHAPTER 5 – AUSTRALIAN SOF DOCTRINE

As has been written earlier, Australia recognizes the importance of SOF in the new face of warfare and has included unconventional and irregular warfare, SO tasks, in its latest White Paper on defence. It also has an additional need to be fully interoperable with U.S. forces, as America forms Australia’s most important military alliance.

Australia has learned many lessons about SO throughout its military history and has used these to develop effective doctrine and procedures for the conduct of SO. The value of SOF to the warfare of the 21st Century was recognized as recently as 10 April 2007, when Australian Prime Minister John Howard announced the deployment of a 300-person Special Operations Group to Afghanistan in order to combat the Taliban.² In short, SO are an important component of Australia’s security needs.

Canada and Australia are very similar nations, in some respects. Australia has a population of 20 million, compared to Canada’s 32 million; a defence force of 51 000 regular personnel, which is comparable to the CF’s 62 000 Regular Force members; and a defence budget of 19.6 billion Australian dollars (18.4 billion Canadian dollars), which compares of Canada’s 15 billion Canadian dollar budget.³ Both nations are members of ABCA and conduct international military operations as members of standing or ad hoc coalitions. Both nations view the U.S. as the most important security partner. While

¹LTCOL David Kilcullen, “United States Counterinsurgency: An Australian View,” http://turcopolier.typepad.com/sic_semper_tyranis/files/Panel5-kilcullen.pdf; Internet; accessed 11 January 2007.

² John Howard, “Media Release, 10 April 2007, More troops for Afghanistan,” http://pm.gov.au/Release/2007/Media_Release24241.cfm; Internet; accessed 10 April 2007.

³ www.defence.gov.au; Internet; accessed 22 March 2007 and www.forces.gc.ca; Internet; accessed 22 March 2007.

there are differences in the evolution of SOF in the two nations, the ADF can still offer many lessons to its Canadian counterparts about how to effectively integrate SOF with conventional forces so as to “punch above their weight.”

AUSTRALIAN SO HISTORY

The Australian forces have a history of irregular warfare, counterinsurgency, and SO dating back to the Boer War. Australian forces fought an unconventional campaign alongside the British in Malaya between 1950 and 1960, seeing their first use of helicopters in support of SO.⁴ Following that, the ADF was an ally of the United States in Vietnam and provided SOF to the military effort there, as well as supplying conventional support to both Australian and American SOF.⁵ In that war, the Australian Army developed a “good reputation for jungle fighting” among the American commanders.⁶ The Australian Army again fought in East Timor in 1999 and 2000, helping that country achieve its independence in a struggle that was largely irregular. In that theatre, Australian Special Air Service (SAS, the SOF Regiment) undertook several SO missions, including the evacuation of Australian non-combatant personnel, reconnaissance, intelligence gathering, liaison with the independence movement and peace enforcement following Timorese independence. It was the largest SOF mission

⁴ The official history of Australian involvement in Malaya and Borneo is Peter Dennis and Jeffrey Grey, *Emergency and Confrontation: Australian Military Operations in Malaya and Borneo 1950-1966* (St Leonards, Australia: Allen & Unwin, 1996).

⁵ Australia, Royal Australian Air Force, AAP1000 *Fundamentals of Australian Aerospace Power* (Fairburn, Australia: Aerospace Centre, 2002), 53-54. Hereafter referred to as AAP1000.

⁶ Brigadier General Williamson quoted in Major Russell Parkin, “The Realist Tradition of Australian-American Military Relations,” *Australian Army Journal* I, no.2 (December 2003): 133.

since Vietnam, and set the stage for future force development of SO capabilities.⁷ In the words of Lieutenant Colonel David Kilcullen, a leading historian on the ADF, “The Australian Army is an irregular warfighting Army.”⁸ This experience has been adopted into Australian military doctrine.

One advantage that this historical view of itself has given the ADF is in dealing with the issue of OPSEC. Because the ADF is accustomed to fighting in irregular conflicts, usually the realm of SOF, it views integration naturally, and its SOF do not use the mask of OPSEC to avoid cooperation. In the words of the current commander of SOCAUST: “special forces have a strong legacy of planning and executing joint and combined missions across a wide spectrum of conflict.”⁹ Unlike the Americans, who dealt with the OPSEC issue only after direction from the CJCS, the Australians come by the solution through a shared history between special and conventional forces.

AUSTRALIAN JOINT SOF DOCTRINE

Foundations of Australian Military Doctrine is the capstone document in that nation’s hierarchy. Subordinate to that document, but still providing guidance to the entire ADF, is ADDP 3.12 *Special Operations*. This is a joint publication that supersedes environmental doctrine. It is a very thorough outline of the concepts of SO, particularly to their integration with conventional forces. “Special forces are not a substitute for conventional forces but are a necessary adjunct to existing conventional capabilities.”¹⁰

⁷ David Horner, “The Force of Choice,” in *SAS: Phantoms of War*, Updated ed. (Crows Nest, Australia, Allen & Unwin, 2002), 483-518.

⁸ Kilcullen.

⁹ Hindmarsh, 23.

¹⁰ ADDP 3.12, 1-2.

Further, the forces of SOCAUST are not meant to fight alone. “SF are assuming an increasingly combined arms, task oriented approach and accordingly must ensure interoperability with conventional forces.”¹¹ Australian doctrine also recognizes the place that SO have across the spectrum of conflict. “The utility of SO is optimized, relative to other ADF FE [Force Elements] during the transition to conflict and transition from conflict when discreet, non-escalatory, non-collateral damage military response options are required.”¹²[emphasis in original] Australian SO doctrine, like its American counterpart, is directed at providing commanders at all levels with integrated force responses across the spectrum of operations in order to achieve the desired effects.

Also like U.S. doctrine, Australia provides guidance on the Command and Control of SOF; this is vital in any joint or combined operation. The 2002 announcement of SOCAUST, under the command of a Major General, created “an equal component in the joint operations arena, equivalent to the Land, Maritime, and Air Commands.”¹³ This move “dramatically increased Australia’s ability to use unconventional warfare methods to respond to the growing asymmetric threat.”¹⁴ The size of the Command doubled between in its first year of operation, as Australian forces were involved in both the Iraq and Afghanistan conflicts.¹⁵ Like the Commander USSOCOM, the commander SOCAUST has full command of all domestic SOF personnel and is responsible to the

¹¹ ADDP 3.12, 4-14.

¹² ADDP 3.12, Figure 1-2.

¹³ MGen Duncan Lewis, “Inside and Outside the Battlespace: Understanding the Rise of Special Forces in Australia,” *Australian Army Journal* 1 no.2 (December 2003): 53.

¹⁴ MGen Duncan Lewis, “Guarding Australians Against Terrorism: The Role of the Australian Defence Force’s Special Operations Command” *Australian Army Journal* 1, no.2 (December 2003): 48.

¹⁵ Lewis, “Inside and Outside...” 57.

Chief of Defence Forces (CDF) for their employment, as well as for capability development, including joint support. He is further responsible to the Chief of Army for the “raising, training, and equipping” of SOF personnel.¹⁶ Australia has developed an extensive liaison system to ensure that Joint Force Commanders receive proper advice on the capabilities of SOF and that they are employed effectively in a theatre.¹⁷ All elements of the support of SOF are summarized as follows: “the joint characteristics of SO also requires support arrangements across Service lines and emphasis on frequently expeditionary support...”¹⁸ Australian joint SO doctrine is well-developed and meant to be clear to all subordinate commanders.

AUSTRALIAN COMPONENT SOF DOCTRINE

Royal Australian Air Force (RAAF)

The capstone document for RAAF doctrine is *Fundamentals of Australian Aerospace Power*, last updated in 2004. The Air Force does not maintain any SOF but it does provide support to SOCAUST. The doctrine is intended to cover all aspects of air warfare and devotes one section to SO. It is brief, but succinct, and covers the host of roles that the RAAF may undertake in support of SOF:

Special Operations Support involves the deployment, support and withdrawal of Special Forces whose mission is highly specialized. This may include inserting troops into enemy-occupied territory without detection to conduct hit and run raids or clandestine operations deep inside enemy territory. These tasks are usually carried out at night and may employ night vision equipment and special training. Aircraft used in these tasks may require modifications or special equipment fits.¹⁹

¹⁶ ADDP 3.12, 3-2, 3-2.

¹⁷ ADDP 3.12, 3-6, 3-7.

¹⁸ ADDP 3.12, 6-2.

¹⁹ AAP1000, 188-189.

The RAAF has recognized the changes in modern warfare and has recognized this by including SO in its baseline doctrine.

Royal Australian Navy (RAN)

Australian Maritime Doctrine is the senior document for the RAN. As such, it integrates SO into most aspects of Maritime Operations. Maritime Power Projection is defined as the delivery of force from the sea and in this doctrine the delivery of SOF is considered projection.²⁰ The Australian Navy also believes that “land forces can make significant contributions to the conduct of maritime operations.” One of these contributions is the use of “special forces to interdict enemy naval forces by strike...”²¹ Submarines are likewise considered a strike platform, not only with their own weapons, but also as “delivery platforms for special forces.”²² Like the RAAF, the Australian Navy sees itself as integrating with SOF in order to accomplish the mission of the country.

Royal Australian Army (RAA)

The senior document for RAA doctrine is *The Fundamentals of Land Warfare*. Similar in approach to the doctrine of the other two services, it recognizes the asymmetric nature of 21st Century warfare and Australia’s requirement to operate in that environment. Of the Ten Army Capability Outputs, “Capability for Special Operations

²⁰ Australia, Royal Australian Navy, RAN Doctrine 1 *Australian Maritime Doctrine* (Canberra : Defence Publishing Service, 2000), 43.

²¹ *Australian Maritime Doctrine*, 95.

²² *Australian Maritime Doctrine*, 97.

Forces” is the first listed.²³ Further, it states that the Army will fight as “combined arms teams” using all of the capability outputs in a joint manner, including SO. It also addresses the issue of coalition operations and interoperability, stating that “the ADF frequently participates in coalition operations across the spectrum of conflict.”²⁴ Clearly, the Royal Australian Army considers SO to be a vital task, both alone and interoperable with coalition partners.

INTEROPERABILITY

One aspect of Australian doctrine that is different from the American, but has valuable lessons for Canada, is interoperability. In the Australian context, this refers as much to the ability to operate with other nations as it does to operate with the other elements of the national military. The vision of ABCA is quite clear: “the ABCA program will achieve the effective integration of the capabilities necessary to enable ABCA Armies to conduct the full spectrum of coalition land operations successfully in a Joint environment, now and into the future.”²⁵ While ABCA is an army program, the ADF has taken this requirement into the joint construct and included it in its capstone doctrine:

With a comparatively small force, it is important for the ADF to be able to participate in, and even lead, coalition operations, in support of Australia’s national security objectives. The ability of the ADF to operate alongside the defence force of another country, and to be seen to be operating with that country, may be an important political consideration for ADF operations in certain contingencies.²⁶

²³ Australia, Australian Army, *Land Warfare Doctrine 1: The Fundamentals of Land Warfare* (Australia: Doctrine Wing, CATDC, 1998), 1-8.

²⁴ *The Fundamentals of Land Warfare*, 4-11 – 4-13.

²⁵ Cody and Maginnis, 65.

²⁶ ADDP-D, 5-15.

When interoperability is discussed, the country that it refers to most often is the U.S. Australian SO doctrine recognizes this requirement for coalition operations, especially in the area of support.²⁷ Since the U.S. has placed an increased emphasis on SO, and Australia seeks to maintain a high level of interoperability with the U.S., Australia has sought to increase its emphasis on SOF, and its ability to be interoperable with American SOF. This effort has paid dividends for the Australians, as they have become an ally of choice for the Americans. In an interview following Operations ENDURING FREEDOM and IRAQI FREEDOM, the Commander of US Central Command (USCENTCOM) General Tommy Franks, stated that “the Australians were very competent, very well-trained and well-equipped troops.”²⁸ The general was originally sceptical about the value of SOF, as noted earlier, but the impact of SO in IRAQI FREEDOM, including those executed by Australian forces, led him to take a positive outlook of this capability.²⁹ Franks stated that SOF were required when “it was necessary to form bands that provided an interdiction capability along major infiltration routes” and that “the Australian SAS [Special Air Service, a SOF] were exceptionally good at this task.”³⁰ The true power of this interoperability was evident when Franks stated, “one would never want to underestimate the power at every level of the alliance between the United States and Australia.”³¹ The ADF has been able to leverage its SO

²⁷ ADDP 3.12, 6-9.

²⁸ Franks, “General Tommy Franks on Coalition Warfare,” 12.

²⁹ Horn, “When Cultures Collide...” 14.

³⁰ Franks, “General Tommy Franks on Coalition Warfare,” 13.

³¹ Franks, “General Tommy Franks on Coalition Warfare,” 18.

interoperability with the United States into a tremendous tool that it can use in pursuit of its national security goals.

SUMMARY

Australia has a military that in many ways is similar to that of Canada in terms of size and resources and it has an important alliance with the United States. Unlike the CF, the ADF has a history of irregular and unconventional warfare that it has used to develop mature SO doctrine. While the CF effort during the Cold War was preparing for a large conventional war in Europe, the ADF was involved in counterinsurgency and SO in Malaya and Vietnam. Despite the very different histories, however, there are still lessons that Canada can learn from Australia, as the latter country has been able to effectively integrate SO into joint operations, and leveraged this capability into an alliance of interoperability with the U.S. This has enabled SOF to contribute, in two ways, to the security of Australia. Canada needs to learn these same lessons and the ADF is an excellent lesson by example from which to learn.

“SOF have truly become the fourth component of joint operations.”¹

CHAPTER 6 – A NEW DIRECTION FOR CANADIAN SOF

The baseline for effective SO doctrine that was established using the American and Australian models can be used to generate recommendations on future Canadian SOF doctrine in order to fill the glaring omissions that were discussed earlier. However, doctrine must be more than written words; it must also include the implementation of these ideas at all levels and in all operations. The American and Australian forces demonstrated this in Operation IRAQI FREEDOM by capturing the lessons learned in previous conflicts, whether alone or coalition-based, and integrating them into effective practices. To that end, the CF are in need of SO doctrine at the joint and strategic level as well as at the component level. Even those elements of the CF that do not undertake SO need to have their ability to integrate with SOF written into their doctrine and plans. Effective C2, including staff and liaison officers, needs to be established within the CF, a process that has begun with the creation of CANSOFCOM. That said, integration of SOF and conventional forces can only be achieved if the two currently disparate groups train together in a realistic environment. Finally, given the current geo-political realities, this integration of forces must be extended to Canada’s alliances, improving Canadian security and allowing Canada to better fulfil its aim of contributing to a more secure world. When the CF have met these needs, which will take a number of years, then they will have hopefully caught up to their allies and be better positioned to meet their obligations, as laid out by the government.

Work has already begun in this area, so the timing is right to implement the proposed changes. The recently stood up Chief of Force Development (CFD) has a

¹ Hammond, 26.

mandate to “synchronize the efforts of the various CF force development communities moving towards the creation of integrated capabilities, by formalizing future security environment analysis, capability based analysis, capability management and strategy implementation activities.”²[emphasis in original] SO work at this level has already begun because CFD has been involved in the “development, coordination, and implementation” of the CSOR and the Maritime Direct Action Companies, both SO capabilities.³ Current doctrine in this area is lacking, but work at the strategic level has commenced, with the concepts of integration and interoperability included.

NEW CF DOCTRINAL DEFINITIONS AND TASKS

As has been discussed earlier, *Canadian Forces Operations* has no chapter on SO, although it has one allocated. If all components of the CF are to work with SOF and integrate their capabilities into mission plans, then it is vital that this doctrine be written. It is not the aim to present a complete chapter ready for inclusion into a publication. Instead this is a presentation of those core concepts that, based on the American and Australian model and the Canadian experience, would allow the chapter to be fully developed and written. To that end, definitions of SO and SOF are required, as well as a Canadian Task List that all commanders and staff officers could work with in order to integrate special and conventional operations.

A working definition of SO was presented in Chapter 1. Unlike the NATO version, it is important that the Canadian definition describe what SO *are*, not what they *are not*. If Canadian SO are compared to the broad statements that make up the original

² BGen C.S. Sullivan, “Force Development and Future Security” (lecture, Canadian Forces College, Toronto, ON, 24 January 2007), with permission.

³ Sullivan.

offering, it can be seen that they are conducted in environments that are “hostile, denied, or politically sensitive.” For example, the recent operations of JTF2 in Afghanistan took place in a hostile environment; those in Haiti in 2004 in a denied one; and in last year’s evacuation of Lebanon was conducted by SOF in a politically sensitive setting. SOF in Canada work in small, tactical units, but their effects are felt at the operational or strategic level, as evidenced by the political maelstrom that followed the published photograph of JTF2 members taking Al Qaeda prisoners in Afghanistan.⁴ Finally, Canadian SO are only conducted against targets that are of high value and not suitable for conventional capabilities.⁵ Therefore, the working definition of SO that was presented earlier is proposed for inclusion in Canadian Forces doctrine:

Special Operations are those operations conducted in hostile, denied, or politically sensitive environments, executed at the tactical level but designed to achieve operational and strategic effects against targets whose destruction, elimination, or rescue is a political or military imperative.

Next, if this definition is applied to those personnel, SOF, who conduct SO, then the definition of SOF presented earlier can similarly be analysed. Canadian SOF are specifically selected for their positions. Indeed, the competition and selection process is very rigorous, involving four stages that include a seven-day in-house assessment phase following screening at the home unit level.⁶ Once selected, the SOF candidate is sent on a seven- to eight-month Special Operations Assaulter Course (SOAC), with further

⁴ Pugliese, 103-104.

⁵ Barr, “SOF Doctrine Brief.”

⁶ www.jtf2.forces.gc.ca; Internet; accessed 23 March 2007.

leadership training for officers.⁷ All SO personnel are assigned to a SO unit, whether it is JTF2, CSOR, JNBCD Company, or 427 SOAS. Assaulters are now considered a Managed Specialty for career management, which allows for specific career progression. All of these factors contribute to being “organized, trained, and supported [for] specialized, highly focussed capabilities special operations,” as described in the working definition. Finally, Canadian SOF are equipped with gear that is not found in any other CF units. While specific details are classified in order to protect the actual capabilities, open source examples include Special Assault Craft, HUMVEEs, and certain weapons.⁸ Lastly, given the unique specialization of training and equipment not found in any other CF unit, Canadian SOF possess capabilities “for which there are no broad conventional force requirements.” Therefore, the earlier proposed definition of SOF is recommended for inclusion into Canadian Forces doctrine:

Special Operations Forces are specifically selected military personnel, organized, equipped, trained and supported in a broad range of basic and specialized, highly-focussed capabilities (special operations), for which there are no broad conventional force requirements.

The next doctrinal requirement that must be developed is a task list. The list presented earlier included all those tasks conducted by American and Australian forces, allowing for their doctrinal analysis, as well as those tasks assigned by the government to Canadian SOF. Many of the tasks are already assigned to CF SOF. DA and SR have been, and continue to be, conducted by JTF2 in the Afghanistan conflict, so they remain

⁷ www.jtf2.forces.gc.ca

⁸ www.jtf2.forces.gc.ca

on the list.⁹ The prime reason for the creation of JTF2 in 1993 was to conduct CT, so it remains.¹⁰ CP of WMD, while not a stated task, can be seen as an element of NBC Defence, which is an assigned task both domestically and abroad. Additionally, the current DPS assigns hostage rescue and recovery of military and non-military personnel from war zones to SOF.¹¹ These can be included under the Australian term SRO and defined as hostage rescue, Combat Search and Rescue (CSAR), and recovery of military and non-military personnel. Finally, the DPS assigned two tasks that are unique to Canadian SOF: assistance to NEO and NBCD. These must be added to the Canadian Core Task list.

In the Canadian context some of these tasks are not conducted by SOF or by the CF in general. FID is the use of SOF to train and assist the armed forces of another government in order to help bring stability to the host nation.¹² Canadian defence and foreign policy, however, does not involve this type of assistance to other governments, so FID can be dropped from a Canadian List of Core Tasks.¹³ That said, the CF do have a long history of training other militaries and are active participants in the Military Assistance Training Programme (MTAP). Therefore, it is not out of the range of possibilities that the training of SOF, either in Canada or abroad in a host nation, may be offered to other nations, as one of the stated goals of MTAP is to “contribute to the global

⁹ Pugliese, Ch 5.

¹⁰ www.jtf2.forces.gc.ca

¹¹ *Pride and Influence: Defence*, 18, 29.

¹² JP 3-05, II-7.

¹³ Maj P.L. Simpson, “The Future of Canadian Army Special Operations Forces” (Toronto: Canadian Forces College Command & Staff Course Paper, 2003), 12. For an detailed description of U.S. FID, see Robert D. Kaplan, *Imperial Grunts* (New York: Random House, 2005).

war against terrorism through select assistance.”¹⁴ Accordingly, FID will be replaced on the task list with Training Assistance (TA). As mentioned earlier, three tasks on the generic list are not SOF tasks in Canadian doctrine, although they are military capabilities. These are Civil Affairs Operations (called CIMIC in Canada), IO, and PSYOPS.¹⁵ These tasks will be dropped from the proposed Core Task List for SOF. Therefore, the proposed version is as follows:

<i>CANADIAN SOF CORE TASK LIST</i>
<i>Direct Action (DA)</i>
<i>Special Reconnaissance (SR)</i>
<i>Counter Terrorism (CT)</i>
<i>Counter Proliferation (CP) of Weapons of Mass Destruction (WMD)</i>
<i>Special Recovery Operations (SRO)</i>
<i>Assistance to Non-Combatant Evacuation Operations (NEO)</i>
<i>Joint Nuclear, Biological and Chemical Defence (JNBCD)</i>
<i>Training Assistance (TA)</i>

INTEGRATION AND INTEROPERABILITY

These definitions and tasks will form the basis, in this study, of SO joint and strategic doctrine. There are two important elements that must be included at the high level as well, if SOF are truly to have an ability to deliver one part of a range of force options across the spectrum of conflict. These are *integration* and *interoperability*.

¹⁴ *Pride and Influence: Defence*, 27-28.

¹⁵ *Operations*, 22-1 to 22-3.

Canadian SOF will rarely, if ever, operate alone. They will almost always be working in concert with Canadian or international forces, either SOF or conventional, or any combination of these. Therefore, in order to be most effective, these two concepts must be included at the strategic level, so that they become part of the process for both special and conventional forces at all levels. This integration has been a problem for SOF in Canada, particularly JTF2, which has often used the mantra of OPSEC to avoid working with other, conventional units. The result has been a schism between special and conventional forces that has reduced the combat effectiveness of both.¹⁶ If SOF remain isolated from conventional forces, then their capabilities cannot be effectively employed by the joint force commander, who is responsible for successful completion of the entire mission, regardless of the forces involved. As well, by remaining isolated, SOF are not able to draw on those conventional capabilities that they could use in order to accomplish their tasks. Special and conventional forces must be integrated at all levels.

This same logic also holds true for interoperability. Canadian SOF have fought alongside their American counterparts in Afghanistan and this trend is likely to continue in the future, as this country becomes more involved in coalition operations. A failure to maintain the ability to integrate could result in the marginalization of Canadian SOF.¹⁷

Canadian SO doctrine must be developed as an integrated construct with conventional forces. This was best described by the Commanding Officer of the CSOR: “JTF2 provides Canada with the tip of the spear, but we can’t go searching for the shaft

¹⁶ Horn, “When Cultures Collide...” 3, 10.

¹⁷ Kiras, 267-268.

on the day of the crisis.”¹⁸ In order to realize this need, a doctrine approach similar to those adopted by the United States and Australia should be adopted. The SOF commander may be, at times, the “supported commander” and, at other times, the “supporting commander.” The use of SO must be viewed by Task Force Commander as one option available in accomplishing the mission. Capturing this intent, and using the American and Australian examples, a proposed article for inclusion in Chapter 29 of *Canadian Forces Operations* is as follows:

INTEGRATION WITH CONVENTIONAL FORCES

1. Special Operations Forces are inherently joint. As such, Special Operations are conducted with the support of any or all three of the environmental elements. SOF are not a substitute for conventional forces, and should not be tasked with conventional forces tasks. SOF are an extension of the Task Force Commander’s force capabilities and when used in a complimentary manner will increase the likelihood of mission success across the spectrum of conflict. In this context, the SOF Commander may be either the *supported commander* or the *supporting commander*, working as part of the combined arms team to achieve the desired effects or objectives.

Achieving interoperability with Canadian allies is equally as important as integration with conventional CF elements. Canada is a member of NATO and NORAD, both military alliances, as well as ABCA, a cooperative organization of armies, and will continue to conduct operations with such organizations, as well as like-minded, ad hoc coalitions. ABCA, in particular, has taken a leading role in improving the interoperability of its members.¹⁹ Accordingly, Canada’s SOF must be interoperable, as defined in Chapter 2, with its allies. This was recognized in the DPS, in which one of the transformation tasks was to “*improve...interoperability with allied forces*, particularly those of the United States, through smart investments in evolving technology and

¹⁸ Hammond, 26.

doctrinal concepts, training opportunities, and exchange and liaison programs.”²⁰[italics in original] The reason for this direction was seen during ENDURING FREEDOM, when problems with Canadians integrating with American SOF were highlighted, particularly with respect to equipment. American SOF had their own helicopters, for example, while JTF2 did not. They were, therefore, required to use American aircraft for insertions in Afghanistan, but their gear was incompatible with the foreign helicopters.²¹ Other problems were noted with intelligence gathering and sharing among nations.²² Therefore, a statement concerning interoperability must be included in Chapter 29 of *Canadian Forces Operations*, and is proposed as follows:

SOF INTEROPERABILITY WITH COALITION FORCES

1. Membership in many alliances is an important part of Canada’s security strategy. As such it is important for CF SOF to be able to participate in coalition operations, and perhaps take a Lead Nation status if required. The ability of CF SOF to operate alongside the militaries of other nations, whether members of a formal alliance or an ad hoc coalition, is a vital aspect of our national strategy and may have political, as well as military, implications. This is particularly true of our most important ally, the United States. Accordingly, SOF will seek acquire and develop equipment, procedures, and intelligence sharing that is, as much as OPSEC and current policy allow, interoperable with those of our allies.

Integration and interoperability may also be complementary. If Canada’s SOF and conventional forces are integrated with each other, and Canada’s SOF is interoperable with that of other nations, then it may be possible for Canadian SOF to work more readily

¹⁹ Cody and Maginnis, 65-68.

²⁰ *Pride and Influence: Defence*, 12.

²¹ Pugliese, 108.

²² Dr J. Paul De B. Taillon, "Canadian Special Operations Forces: Transforming Paradigms," *Canadian Military Journal* 6, no. 4 (Winter 2005-2006): 72. [journal on-line]; available from <http://www.journal.dnd.ca>; Internet; accessed 6 December 2006.

with the conventional forces of other nations and vice versa.²³ This could have tremendous benefit for Canada to “punch above its weight.”

OPERATIONAL SECURITY

OPSEC has been a long-standing problem in the integration of special and conventional forces, not just in Canada but in other nations as well, as evidenced by the previous statements of Admiral Crowe. While secrecy about the execution and tactics of SO is a necessary part of such operations, and security is one of McRaven’s six principles of SO, it is often used as a reason to avoid cooperation with conventional forces.²⁴ As a result, the two types of operations need to be deconflicted, as referred to by General Franks, when they should be integrated. Finally, it is usually the conventional commanders and their forces that remain in theatre after the cessation of hostilities, forced to deal with the ramifications of SO that they may not have known about nor had a role in planning.²⁵ There are two effective solutions to this problem: training and command.

TRAINING

There is a military axiom that states “train like you fight; fight like you train.” If integration of special and conventional operations is to become a reality, then it must begin with opportunities for the two forces to train together. This requirement is not only a maxim, it is also tasked in the DPS, which states that: “maritime, land, air and special operations forces will emphasize cooperation and teamwork at all levels to achieve a

²³ LTCOL Mark C. Arnold, “Special-Operations Forces’ Interoperability With Coalition Forces,” *Special Warfare* 18, no. 2 (September 2005): 24. [journal on-line]; available from <http://proquest.umi.com>; Internet; accessed 04 December 2006.

²⁴ Horn, “When Cultures Collide...” 10.

²⁵ Horn, “When Cultures Collide...” 10-11.

greater effect than the sum of the individual parts” and to “improve special operations training capabilities.”²⁶ This can only be accomplished through effective peacetime training. The “tip of the spear” must work with the “shaft” before any crisis. To do otherwise would be too late. This lesson was tragically learned by American SOF and conventional forces in Iran in 1980, and there were problems with special and conventional force integration in Afghanistan in 2001 that could have been avoided had these elements trained together prior to that conflict.²⁷ Afghanistan provided developmental opportunities that led to the success in Iraq.²⁸ Canada, however, does not have such a luxury, and needs to learn these lessons from others.

There are many joint exercises conducted by the CF every year, including some that have traditionally been single service, such as MAPLE FLAG and MARCOT, which would provide valuable training opportunities to integrate special and conventional forces. While details regarding the training of SOF are classified and cannot be included in this study, there is evidence that Canadian SOF are not being integrated in conventional training exercises as much as they should be.²⁹ The result of this was that the SOF did not trust the conventional forces that they were working alongside.³⁰ Integrated training would also provide the task force commanders with the opportunity to see SOF as one option available to them in the resolution of an operational problem.

²⁶ *Pride and Influence: Defence*, 12-13.

²⁷ Schreiber, Metzgar and Mezhir, 45.

²⁸ Hammond, 23.

²⁹ Hammond, 26.

³⁰ Colonel Dave Barr in Chris Thatcher, “Canadian Special Operations Forces Command,” <http://www.vanguardcanada.com/CanadianSpecialOperationsForcesCommand>; Internet; accessed 10 April 2007.

Training can also help to overcome the OPSEC problem. By training together, conventional force commanders will have a better understanding of SOF procedures, while still respecting their security needs and SOF commanders will learn to trust conventional forces and their commanders with their security.

Two things are required for effective training. The first is direction from the strategic level making it a priority. The second is the funding that major exercises require. This would also be required from the strategic level. If these shortfalls were addressed, as tasked in the DPS, then training to unite the tip of the spear with the shaft could be begin.

ENVIRONMENTAL DOCTRINE

Both the Australian and American environmental, or service, doctrine have references to their role in integrating with, conducting, or supporting SO. If Canada is to achieve the same level of integration, then its doctrine must reflect this. The Canadian Army already has sufficient reference to SO in its capstone document, but the Navy and Air Force do not. Remembering that, by definition, doctrine should be broad principles and not specific direction, it is possible to propose doctrinal changes for the Navy and the Air Force that can be written into their capstone documents so that they are better positioned to integrate with, and support, SO.

Air Force doctrine should not be platform based. Rather, it should address those capabilities which the service is required to possess in order to meet its obligations for the defence of the nation. The DPS provided the aerospace forces with three tasks in support of SO: “acquire medium-to-heavy lift helicopters, to support land and special operations....,” “provide a special operations aviation capability to the Special Operations

Group for operations anywhere in Canada” and “provide a globally deployable special operations aviation capability to the Special Operations Group.” This direction is focussed on two broad themes: air (fixed wing) and aviation (rotary wing) support to SO, and provision of and SO aviation capability. Using these tasks, and the simplicity of the RAAF doctrine statement on SO as an example, it is possible to propose the following statement for inclusion into *Canadian Forces Aerospace Doctrine*:

SPECIAL OPERATIONS

1. Special Operations (SO) are those operations conducted in hostile, denied, or politically sensitive environments, executed at the tactical level but designed to achieve operational and strategic effects against targets whose destruction, elimination, or rescue is a political or military imperative. Aerospace Support to SO may involve deployment, support and withdrawal of Special Operations Forces into or out of enemy-occupied territory without detection to conduct hit and run raids or clandestine operations deep inside enemy territory. This support may be accomplished using dedicated aircraft and crews (for example – a Special Operations Aviation Squadron) or those aircraft and crews normally used in other roles (for example – Strategic Air Mobility), depending on the tactical situation and risk involved. Aircraft used in these tasks may require modifications or special equipment fits. All branches of the Air Force may be required to support SO within the limits of their concepts of operations (for example – Maritime Helicopter). Participation in, or support to, SO may be conducted domestically, within North America, or on an international operation.

Like the Air Force, Navy doctrine should not be platform based. It should address the capabilities required in order to guide the procurement and development of new classes of vessels and their operation procedures. The Navy also received three tasks in the DPS involving SO, although these were lacking some detail: “enhance the ability of their ships to support the Special Operations Group...,” “provide, when required, submarines in direct support of the Special Operations Group for operations within Canada’s oceans,” and “sustain indefinitely the deployment overseas of...a submarine and a ship, for operations in direct support of the Special Operations Group.” As written

earlier, these tasks focus on submarines, and are therefore platform based. Instead, a proposed doctrinal statement for the Navy should involve both surface and sub-surface combatants:

SPECIAL OPERATIONS

1. Special Operations (SO) are those operations conducted in hostile, denied, or politically sensitive environments, executed at the tactical level but designed to achieve operational and strategic effects against targets whose destruction, elimination, or rescue is a political or military imperative. Maritime Support to SO may involve deployment, support and withdrawal of Special Operations Forces into or out of enemy-occupied territory without detection to conduct hit and run raids or clandestine operations inside enemy littoral territory. This support may be accomplished using surface combatants, small craft or submarines depending on the tactical situation and risk involved. Vessels or craft used in these tasks may require modifications or special equipment fits. All branches of the Navy may be required to support SO within the limits of their concepts of operations. Participation in, or support to, SO may be conducted domestically, within North America, or on an international operation.

COMMAND, CONTROL AND LIAISON

As has been noted in the examples of Australia and the U.S., it is important that the C2 of SO be properly planned and executed in order to ensure that SOF are used for the proper roles and that their value as an operational or strategic asset is not squandered. Both the ADF and American forces created a Special Operations Command in order to meet these requirements. The aims of both of these organizations were similar: domestic force employment of SOF; force generation of SOF for other component or task force commanders; and, providing commanders at all levels with the knowledge and expertise to effectively employ SOF. Canada has already captured these lessons, as evidenced by the creation of CANSOFCOM in 2006.

There are, however, still areas for improvement within the C2 of Canadian SOF. The first improvement would be to raise the rank of the Commander CANSOFCOM

from Colonel to Brigadier General. Currently, COMCANSOFCOM is accountable for the force generation of the Canadian SO capability, as well as the command, control, administration, and discipline of CANSOFCOMHQ, JTF2, CSOR, and JNBCD Company, and has operational command (OPCOM) of 427 SOAS.³¹ While his span of authority is roughly equivalent to that of a Brigade Commander, all of whom are Colonels, there is a significant difference in the level of responsibility between COMCANSOFCOM and the Brigade Commanders. COMCANSOFCOM is a commander of a strategic level resource, responsible to provide advise on domestic and international SO to the CDS and the government, in the same capacity as the Environmental Chiefs of Staff (ECS), commander Canadian Expeditionary Forces Command (CEFCOM), and Commander Canada Command (CANADACOM), all Lieutenant Generals or Vice Admirals. If the commander of CANSOFCOM is to be truly equivalent, he should be a general officer, on par with the SO commanders of its allies. Promoting the commander to general officer status would be more in keeping with the position as a strategic commander, vice one who responsible for a component of one service. There would be a secondary benefit to this more in that it would bring SO expertise into the general officer ranks, raising the level of professional knowledge and enabling improved integration.

The other area for improvement is liaison. As CANSOFCOM grows in size and responsibility, so will its interaction with other operational headquarters. Yet, despite this, there are no SO liaison officers across the CF. For example, 1 Canadian Air

³¹ Chief of Defence Staff. CANFORGEN 184/05 CDS Organization Order – CF Transformation and Realignment of Elements of the DCDS Group (CDS 098/05 061344Z Dec 05) and CANFORGEN 017/06 CANSOFCOM Organization Assignments (CDS 012/06 031254Z Feb 06).

Division Headquarters (1 Cdn Air Div), the CF Air Component Commander (CFACC), has naval and ground liaison officers in its organization, but not a SOF LO. This role is filled by a staff officer assigned from 1 Cdn Air Div to the staff of the Dwyer Hill Training Centre (DHTC, the home base of JTF2). Yet by ACC doctrine, there is supposed to be a liaison staff from each of the other components, including SOF.³² There are no SOF LOs at the Joint Task Force Headquarters that comprise CANADACOM. If SO is to be truly integrated, and to be one of the force options available to all commanders, then an effective SOF staffs required at all levels. This problem is not unique to Canada; it is also a lesson learned in USSOCOM. Effective liaison also addresses the problems raised by excessive concern for OPSEC, a lesson learned by American joint forces in Afghanistan³³ If used properly, it allows SOF to conduct clandestine operations while keeping conventional force commanders aware of such activities, even if they do not need to know mission details. If the full potential of the integration of special and conventional forces is to be achieved, it starts with effective liaison.

SUMMARY

Correcting and enhancing CF doctrine, both joint and environmental, in order to reflect the 21st Century requirements for SO need not be cumbersome or controversial. The process has been helped by CF Transformation, which created CANSOFCOM, but also hindered by the same process. The impact of the CDS' initiatives has been to reduce

³² Canada currently has no doctrine for the manning and operation of an Air Component or an Air Operations Centre (AOC), referred to as a Combined AOC (CAOC) if it is multinational. Instead, it relies upon USAF doctrine.

³³ Schreiber, Metzgar and Mezhir, 42, 45.

the manning levels in the CFD and has slowed the creation of most doctrine, including that for SO. The direction has been provided in the DPS and good examples abound.

The subject has been written about by both academics and military officers in a variety of forums, so ample research to support any changes already exists. What is needed now is the will to make the changes, and then act upon them.

*“Humans are more important than hardware.
Quality is better than quantity.
SOF cannot be mass-produced.
Competent SOF cannot be created after emergencies occur.”¹*

CONCLUSION

The world is changing, and Canada needs to change with it or risk its security. The three priorities of the CF, as directed by the Government of Canada, have changed little over the years: defence of Canada; defence of North America; and, contributing to international security. SOF fill important roles in all of these tasks. Canada’s closest and largest military ally, the US, has placed tremendous emphasis on the effective integration of SOF with its conventional forces, based on the lessons learned in operations ranging from Iran to Afghanistan. The ally closest to Canada with respect to defence spending and force size is Australia. It, too, has learned many lessons in its history on the need for, and integration of, SOF. Canada can learn from these partners as it begins to develop its own SO doctrine. This development has already begun with the creation of CANSOFCOM as a force generator and force employer. However, much work remains at both the joint and environmental levels in order to effectively integrate SOF so that their unique functions can be applied across the spectrum of conflict.

Sound doctrine begins with sound policy. To date, there has not been an update to the 2004 Defence Policy Statement. While it provided clear, initial direction to the CF, the next version of that document, regardless of the party that is in power and releasing it, needs to address special operations at the highest levels. Only when the CF knows the strategic requirements and roles for SOF can it begin to write doctrine and plan the required force development. This is perhaps more important for SOF than for

¹ Barr, “SOF Doctrine Brief.”

conventional forces, for they are able to use tactical action in order to achieve strategic results. Along with government policy should come the proper resources required in order to integrate special and conventional forces. This goes beyond money for hardware and operations. It includes sufficient personnel in order to fill the staff and liaison positions required and the training budget opportunities that the CF needs in order to effectively integrate. In addition, any government level work needs to examine the relationship between SOF and statesmen, who have, at times and in other nations, tended to view SOF as a political tool, given their ability to have strategic effects. SOF can also be viewed by politicians as a small solution to large problems when, in fact, the interoperability that they require with conventional forces can make their footprint quite large, especially on international operations.

Also needed is the marrying of SOF doctrine and the acquisition of equipment for conventional forces. If they are to be truly integrated and interoperable with Canadian, and possibly allied, SOF, then conventional forces need to make major purchases with this in mind. As the Canadian Navy looks to replace its frigates, destroyers, and supply ships, it needs to consider the growing importance of Maritime Counter Terrorism (MCT) and the integration of SOF and maritime forces to counter that threat. This holds true for the Air Force as well as it acquires the C-130J, the C-17, and the Chinook and Cyclone helicopters. All of these platforms can have a SO role, and this needs to be reflected not just in doctrine, but also in the tactics, techniques, and procedures (TTP) that are adopted as they are employed.

Finally, the issue concerning the rank and status of the Commander CANSOFCOM needs to be studied. While the only operational commander that is both a

force generator and employer, the position is lower ranking than the others, who have only force employment responsibilities. As well, this position serves as the government's subject matter expert on SO. Given the potential strategic impact of these operations and the seat at the table with allied SOF commanders, the barriers that have prevented a general officer from assuming this position need to be examined.

These changes to policy need to come soon. In 2010 Vancouver will host the Winter Olympics. This event will require defence security operations over the air, land and sea, prepared to face threats that could come in any form. SOF in the CT role will require support from all three elements in order to ensure the security of the event. As demonstrated in Munich in 1972, the games provide a world stage for terrorists to make a statement or try to achieve a goal. Recognizing this, a Joint Task Force Games is being stood up in Esquimalt. However, with less than three years until the games begin, there is little time to address the needs already outlined in this paper. Vancouver's location on a coast and on the border with the U.S. will contribute to the challenges of integration and interoperability, as will the participation of various international security services, whether these are police, para-military, or military in nature. The consequences of failure may be high.

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