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Campaigning with partners in the fourth age of SOF – the case of Norwegian – U.S. High North collaboration

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ABSTRACT

Special Operations Forces (SOF) need to adapt to a new operating environment, characterized by competition, state-centric threats, and the use of conventional military power. The adaptation is a consequence of the existing causal relationship between given security environments and the role and activities of SOF. In the case of the High North, this entails SOF pivoting from being the supported entity to a supporting entity of the combined joint force. Norwegian, and U.S. SOF can effectively campaign in this theater by focusing at how different aspects influence future success. Aspects discussed are (i) *Perspective*, (ii) *Conventional Military Capabilities*, (iii) *SOF Capabilities and Authorities* (iv) *Development and Investments*, and (v) *Adversaries and Competitors*. By prioritizing and understanding how these aspects influence future campaigns, the Combined effort of Norway and the U.S. will be postured to support strategic objectives within the High North as defined by policymakers and military commanders.

Introduction

During the last twenty years, Special Operations Forces (SOF) have gradually expanded their role and relevance, becoming a preferred military option for decision-makers looking to affect and influence the current operating environment. Although a logical choice during *the golden era* of counter terrorism (CT) and counterinsurgency (COIN) post-9/11, ongoing and expected geopolitical developments are gradually changing this, forcing decision-makers to rethink what represents successful use of SOF. Albeit somewhat dramatic, this is very much akin to the nature of SOF, whose identity is shrouded in a reality of constant change and the need to innovate and adapt to stay relevant and efficient. Scholars and practitioners agree that change is necessary in order to face emerging state-centric threats,¹ but defining what these adjustments entail remains somewhat ambiguous.

However, SOF throughout the western world are updating their strategies and approaches to these threats in an attempt to stay relevant and ahead of the curve. For the United States Special Operations Command (USSOCOM) this has led to an adjustment of its enterprise priorities—*people, win and transform*—where the two latter refer

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to the ambition of ensuring SOF adapt and remain a winning entity alongside its allies and partners.

This article directs attention at a specific operating theater, *The High North*, and on how U.S. forces can partner with Norway—a small and trusted ally—in order to enhance SOF and the combined joint force. In consequence, our research question is: *What does a successful Norwegian–U.S. SOF partnership look like in the emerging High North theater?*

We approach this research question by looking at five aspects deemed important to a successful partnered SOF campaign: (i) *Perspective*, (ii) *Conventional Military Capabilities*, (iii) *SOF Capabilities and Authorities*, (iv) *Development and Investments*, and (v) *Adversaries and Competitors*.

Taken together, these aspects exemplify how a successful Norwegian—U.S. military campaign in the High North will require integrated efforts between those operating in this environment, in addition to relying on the local knowledge of those playing on their home turf. SOF will largely have to take on a supporting and enabling role, with activities that expand the reach, access and effect of conventional forces. This change in relation to role and activities will increase integrated efforts at deterring threats in the pre-conflict stage in addition to enhancing the overall effect of the combined joint force if conflict moves beyond the threshold of war. Furthermore, a successful partnership between Norwegian and U.S. forces in the High North should include coordinated efforts with strategic assets beyond SOF, as well as tailored investments in combined training, exercises, plans, and capability development. Failing to prioritize these factors can lead to a regional power vacuum and potentially degenerate and prevent levels of interoperability required to deter and defeat an adversary within the High North theater.

Special Operations Forces

Special Operations Forces (SOF) are military units uniquely capable of adapting to new situations, solving complex tasks, and creating effects beyond the reach, capability, and expertise of conventional forces. The NATO Allied Joint Doctrine for special operations defines SOF and special operations as “military activities conducted by specially designated, organized, selected, trained and equipped forces using distinct techniques and modes of employment.”² These units should therefore be understood as different from the conventional military when it comes to tactics, techniques, and procedures (TTPs), as well as their ability to solve complex tasks with reduced signature and elevated levels of tactical, strategic, and political risk.³ These distinctions necessitate different doctrines and principles compared to conventional forces, with a focus on flexible and agile organizations, delegation of decision-making authority, and the ability to innovate and adapt in order to utilize technology in new and creative ways.

SOF are largely characterized by their focus on small teams and operators with specialized skills. These units are able to operate across warfighting domains via insertion from land, sea, or air, often in small numbers with little support. They are able to perform activities within a wide spectrum, defined broadly by NATO doctrine as Direct Action (DA), Military Assistance (MA), and Special Reconnaissance (SR).⁴

U.S. SOF doctrine is however more task-oriented, consisting of thirteen different activities.⁵ Regardless of doctrinal perspective, SOF is usually associated with unconventional or asymmetric warfare.⁶ These units are able to operate as an entity decentralized from larger campaigns and conventional military structures in order to conduct special operations that are covert, clandestine, or compartmentalized.⁷ The activities of SOF are often linked with those of the intelligence community. Depending on national regulations, existing authorities, and mandates, SOF can solve a wide range of missions beyond traditional military activity.⁸

SOF are also able to operate in an interconnected manner with the conventional military, known as *joint operations*. By operating alongside conventional forces, SOF can ensure that certain elements are utilized to their full potential. This cooperation is critical for smaller nations such as Norway, as many of the supporting platforms and capabilities needed by Norwegian SOF belong to the conventional military. Consequently, operating jointly is oftentimes necessary in order to support the operational objective SOF is set to achieve. SOF can also be employed jointly in order to enhance and force-multiply conventional forces in support of larger military campaigns, operations, interagency activities and objectives.⁹

In specific situations, SOF can solve what might look like missions suitable for conventional forces. These situations often raise discussions of potential misuse of SOF in military circles. However, given the right circumstances, i.e. the specific value of a target, elevated risk, climatic and geographical concerns, etc., these missions require SOF in order to increase their likelihood of success. Mission profiles as these aligns with what was described as “Hyper Conventional Special Operations” during the CT and COIN era.¹⁰

SOF is also expected to operate with international partners to achieve common and aligned objectives, known as *combined operations*. SOF from allied nations regularly team up to conduct operations, or they embed operators with other nations in order to further integrate and learn from each other. SOF perform Military Assistance (MA) activities when they teach, enhance, or utilize partner capability. The U.S. has developed a complex and broad system for Security Cooperation (SC) and Security Sector Assistance (SSA), and SOF hold several unique authorities that allow, encourage, and enable allies and partners to solve challenges in a combined manner.¹¹ These programs range from training and equipping partners to providing humanitarian assistance, performing combined exercises, and educating foreign militaries.

SOF is considered a *campaigning organization*, meaning they are part of military campaigns which entails “a framework to orchestrate and synchronize simultaneous activities and operations aimed at accomplishing or enabling policy aims.”¹² It also means that we must think of military activity as “an ongoing activity” rather than activities with clear start and end points.¹³ The concept of campaigning also means a continuous process of adaptation,¹⁴ which makes SOF a highly relevant tool.

The tasks, organization, and activity of SOF are closely linked to the operating theater and desired strategic ends as defined by decision-makers. This linkage calls for SOF to be in a state of continuous evolution with a flexible mindset and a culture embracing change. This requirement is even more evident as SOF must be able to operate both overtly and in indirect or non-attributable ways across domains, geographies, theaters, and operational phases, and be able to adapt to ongoing developments

and emerging constraints. This dynamic flexibility often demands emergent strategies, rather than relying on long term detailed plans. That being said, this does not mean it is necessary or relevant for SOF to be an entity always relying on *ad hoc* solutions every time it is asked to support a strategic effort toward an objective. Successful SOF organizations are highly effective and learning oriented, capable of identifying lessons requiring adaption, and implementing change in their organization in order to learn from experiences, successes as well as mistakes.

The fourth age of SOF

Throughout its short history, SOF have grown and adapted in parallel with the operations they have conducted, the different adversaries they have handled, and with the environments they have faced. These developments can be viewed as evolutionary stages, often beginning with an event or condition serving as a catalyst for change.¹⁵ Such events represent concrete challenges that require the use of SOF in order to achieve desired results. Scholars increasingly agree that these developments can be described as unique “ages of SOF” or paradigms that clearly separate how these units were trained, equipped, and utilized. These ages have brought forth the need for dramatic shifts in everything ranging from TTPs to capability requirements as well as the strategic effect that SOF are meant to support.¹⁶

The description of these *ages* vary, but depending on the perspective one takes, they are often termed along the lines of historical events that shaped the outcome of a crisis or conflict. In effect, there are details that differ depending on the national point of view, as some developments are not shared across borders. A common theme among these *ages* is an event or challenge that requires small units of specially selected personnel with superior training, equipment, and skills to conduct politically sensitive missions with high degrees of complexity beyond the scope and skills of conventional forces. SOF are therefore the preferred unit when activities mandate extraordinary or unorthodox TTPs, areas that are difficult to reach, sensitive operational environments, or low visibility with various degrees of covertness.¹⁷

How these forces are properly employed and create desired effects within a specific age depends on various aspects and factors. A starting point for identifying these factors is asking the following questions: What perspective do decision-makers have pertaining to the concrete situation? What is the role of conventional military capabilities in relation to SOF? What capabilities and authorities are available to SOF? What are SOF able to do, and what has been prioritized in terms of development and investments? How do the capabilities and intentions of potential adversaries and competitors affect SOF and their desired objectives?

As revealed by these questions, the means employed by SOF are not only affected by the adversary they face—in addition to the intensity, scenario, and type of conflict they are engaged in—but also the availability of capabilities, their long-term strategies and their relationship with the conventional military. In effect, these aspects, although not exhaustive, will help determine what an “age of SOF” entails and how the concrete operating environment and geopolitical situation affect the ability of SOF to operate and achieve strategic end states as defined by decision makers.

The activities of SOF can span conflict phases, and these units may find themselves focusing on everything ranging from deterring an adversary, and thereby shaping the operating environment, to conducting unconventional high-intensity warfare, depending on the objective they are supporting. In other words, there exists a causal relationship between the security environment and the role and activities of SOF.

From a western point of view, these “ages of SOF” can very broadly be categorized into three paradigms, starting with *the Second World War*, followed by *the Cold War* and moving into the *Global War on Terrorism*. In the first two ages, SOF mostly remained a sideshow to the conventional force.¹⁸ That does not mean that they were not utilized or did not play an important role in these ages. Nonetheless, the overarching strategic end states within *the Second World War* and *the Cold War* were obviously not determined by the actions of SOF alone. Regardless, these ages required different forms of unconventional warfare, giving way to the utilization of these units.¹⁹

During *World War II*, SOF were largely used for strategic raids, direct action, and activities that very often put them in high-intensity engagements. When this age ended SOF had to adapt and leave behind what used to work in order to become the force it needed to be in order to remain effective during *the Cold War*, demonstrating how geopolitical changes required SOF to reinvent themselves.²⁰ As such, during the Cold War, SOF were used in a more indirect fashion, often by supporting efforts of proxy warfare and intelligence collection as well as hostage rescue and deterrence.

The third stipulatory “age of SOF,” known as the *Global War on Terrorism*, was largely characterized by counterterrorism (CT) and counterinsurgency (COIN) directed at violent extremist organizations (VEOs) in the post-9/11 era. This age differs from the two previous ages as it saw SOF take a leading role in combat operations, supported by conventional forces, no longer being the sideshow but often the decisive factor that found, fixed, and engaged strategic targets. This age is also unique in relation to the fact that the main adversary was VEOs and not state actors, as was the case with the two previous ages. SOF gradually grew in this period, becoming the unit of choice for military and political decision-makers alike with expansion of SOF peculiar capabilities enabling CT and COIN. As such, the *Global War on Terrorism* can be viewed as an anomaly and the *golden age of SOF*, where the concept of *success* was defined by direct action and strategic raids aimed at VEOs.

The “third age of SOF” has largely shaped how western SOF are organized and perceived today, making the conduct and operations of this age an integral part of the identity and culture of contemporary SOF. Although scholars and practitioners believe that CT and COIN must remain an essential skillset for SOF, there is an increasing consensus that the evolving operating environment calls for the advent of a new paradigm, or “age of SOF,” which will eventually challenge the tasks and missions of these units yet again.²¹

The “fourth age of SOF” emerges in a period where Russia and China are aggressively launching efforts to expand their territories and areas of influence.²² These actors seek to confront the U.S. and its allies through persistently pursuing opportunities that can expand their power and sphere of influence. A binary approach to war and peace no longer seems valid, and military-capable state actors operating across numerous environments are challenging the rules-based system. These actors employ a

combination of traditional and irregular capabilities with the aim of securing their interest and gaining advantages over others.²³

The threshold for threatening or utilizing military force is being challenged. No contemporary example is clearer than Russia's full-fledged invasion of Ukraine in February 2022; an act condemned by large parts of the world. The invasion not only represents Russia cutting ties with the western world and Putin exposing his real intentions, but it also confirms how the current security environment holds a potential of escalating into a hot war between Russia and NATO.

Geopolitical turmoil such as this, coupled with the emergence of new technology and weapon systems represents a dramatic shift away from the third age and its *Global War on Terrorism*. In consequence, the "fourth age of SOF" will be defined by an operating environment with multiple actors across numerous domains and theaters, capable of employing a combination of traditional and irregular capabilities.²⁴ Western militaries find themselves at a junction and are actively attempting to define what this will require for SOF and to reimagine what successful campaigning looks like. The current approach largely relies on integrating allied efforts and rediscovering the character of state-centric warfare, while remaining aware of emerging technologies and activities below the threshold of war.²⁵ The "fourth age of SOF" cannot be viewed as a finite paradigm consisting of one singular environment, but as an overarching concept that requires local knowledge of the physical and cognitive domain as well as the capabilities and intensions of potential adversaries.

Consequently, the character of this emerging age imposes the exploration of concrete theaters in order to understand exactly what might shift the strategic balance as well as what the ideal role of SOF might be. It will require an understanding of how the aspects identified in this section affect contemporary opportunities and challenges for SOF. For the remainder of the article, this will be illustrated by looking at how the "fourth age of SOF" can come into play within the High North theater and how this security environment causally relates to possible combined campaigns that include Norwegian and U.S. SOF.

The High North: contested and austere

The term *High North* is largely derived from Norwegian political discourse, meant to describe the geographical Norwegian territories above the Arctic Circle. It is a broad concept that includes sea and land as well as islands and archipelagos, stretching northwards from the southern boundary of Nordland County in Norway and eastwards from the Greenland Sea to the Barents Sea. At the same time, it is very much a political term encompassing the administrative entities in Norway, Sweden, Finland, and Russia that are part of the Barents Cooperation, as well as these countries' Arctic ties with Canada and the U.S. through the Arctic Council and the EU.²⁶ The geographic High North areas therefore touch the border of several countries that have economic and military interests in the area. It is, however, important to note that the High North is only a small part of the Arctic, not synonymous with it.

Except for some islands, as well as the northern territories of Norway, the High North is largely a maritime theater. It is a harsh environment with long winters and limited conditions for commercial and military activity. Temperatures are low, and the

area features characteristics that are typical for cold areas, such as ice and permafrost. The weather is difficult to predict, and conditions may change in minutes, going from high visibility to complete whiteout. During winter, the environment sees no sunlight, while in the summer months, the sun never sets. For military land forces it means that during winter, they must operate in snowy terrains that do not allow non-augmented movement on foot for any significant distance, while in summer, the vast marshlands will significantly reduce mobility options as well as challenging the concept of “owning the night.” Very few military formations have the training or equipment to operate over time either at land or at sea in the High North and Arctic.²⁷ There are limited satellites covering these areas, and the unique latitude of the High North brings with it severe challenges when it comes to the electromagnetic spectrum, making navigation, positioning and communication difficult.²⁸

The High North is rich in natural resources such as seafood, oil, gas, and minerals. Climate change affects the High North and opens a new sea corridor that can lower transportation costs between Asia and Europe as melting ice gradually lowers the threshold for commercial operations in this area. Consequently, the geopolitical importance of the region will rise in the coming decade.²⁹ The area is scarcely populated, and there are few big cities, mostly akin to small towns or farms with vast unpopulated areas and big mountains in between. There are chokepoints and bottlenecks that make logistics from southern parts of Norway into the High North vulnerable because of narrow roads and a limited number of bridges and railroads that can be used for resupply. Consequently, the sea route is all the more critical. The islands in this particular area, such as Svalbard and Jan Mayen, are connected to mainland Norway via undersea communications cables. The physical attributes of the High North make it an austere environment that can be difficult to reach and challenging to maneuver and operate within.

There are several treaties in place to ensure a stable working relationship between Norway, the Arctic countries, and in particular Russia. Firstly, the Svalbard treaty, signed in 1920 after World War I, regulates use of the archipelago. Particularly, it states that although Norway has full sovereignty of the island and its territorial waters, Norway will not use the island for “war like purposes.”³⁰ Secondly, in 2011 Russia and Norway agreed on the dividing sea-line between the countries, a result of 40 years of negotiations. The agreement has helped ease tension over issues such as fishing regulations and border crossings. Russia and Norway also have a working relationship when it comes to Search and Rescue (SAR) operations, coordinating coastguard to coastguard. Because of these agreements, Norway maintains a somewhat stable relationship with Russia in the High North, even though Russia’s annexation of Crimea in 2014 and the invasion of Ukraine in 2022 both have significantly reduced trust and levels of cooperation.³¹

Arctic nations are expanding their footprint and physical presence both within and around the High North. Russia has increased its Arctic infrastructure in recent years and are actively planning to extend its activity. China, which despite not being an Arctic country, has proclaimed itself “a near-Arctic state” and has ambitions of becoming a powerful regional actor by expanding its Belt and Road initiative to include the Arctic.³² China adheres to the judicial and institutional framework for Arctic cooperation but is also engaging in efforts to strengthen its influence within this system and

to challenge certain aspects of Arctic governance. These efforts include ensuring its access to sea lanes and, potentially, natural resource extraction required to augment its technological development. It can be seen as part of its global strategic ambition, and China has recently increased its Arctic presence, pursuing infrastructure contracts and a permanent scientific presence.³³

Seen from NATO, and in particular Norway, the main potential threat in the High North stems from Russia, which has its Northern Fleet in the city of Severomorsk located at the Kola Peninsula just east of its border to Norway. This particular naval base is home to Russia's nuclear-powered submarines as well as several mechanized brigades. Severomorsk is often referred to as the host to large parts of Russia's second-strike nuclear capabilities.³⁴ Consequently, the presence of Russian naval and air assets in the High North theater is very much part of the common operating picture. Despite this, the current narrative when it comes to Russia in the Arctic and its High North interests is one of control, stability, and maintaining the status quo. Russia does not seek unhindered escalation, as it could potentially damage its regional economic interests.³⁵ Simultaneously, Russia has gradually altered its overall rhetoric in recent years, becoming more focused on state sovereignty, territorial integrity, and concerns regarding foreign military activity in the Arctic.

Russia has amplified its military presence and activity in the High North over the last decade with the addition of capabilities that allow for asymmetric escalation, enabling exploitation of vulnerabilities held by Norway and its allies.³⁶ These efforts are both kinetic and non-kinetic and cover all phases of conflict. There have been several instances where Russian electronic warfare activity has interfered with civil aviation over Norwegian territory.³⁷ Russia is also seen as actively pursuing below-threshold maritime activity in this area, and there are frequent observations of civilian fishing or research vessels sailing without their Automatic Identification System (AIS) switched on, conducting what is believed to be Russian intelligence collection of ongoing NATO activity or mapping of subsurface infrastructure.³⁸ Although the 2023 sabotage of the Nord Stream 2 pipeline has yet to be publicly attributed, this event has caused concern about the vulnerability of undersea infrastructure within the High North.³⁹ Events such as these demonstrate how Russia is attempting to influence and shape the narrative of the High North by conducting indirect or non-attributable information campaigns, collection, electromagnetic attacks, and possibly physical sabotage aimed at Arctic nations.

Should tensions between NATO and Russia escalate, the High North represents a possible staging area for allied military activity that can threaten Russia's nuclear strategic interests in the northern and western parts of its country and in effect deny Russia's freedom to operate its naval assets. As a consequence, Russian doctrine dictates that in case of a perceived threat from NATO, and in particular the U.S., Russia will employ what is commonly referred to as "the bastion defense" concept.⁴⁰ The bastion defense concept involves Russia pushing its military capabilities further west and south and into what is the High North territorial waters and sovereign territories of Norway with the aim of denying NATO access to these areas. By establishing Anti-Access/Area Denial (A2/AD), Russia can potentially cut off Norway and NATO from upholding control of its High North territories as well as expand the reach of the Russian nuclear threat. If Russia is successful in deploying its concept, they will in effect have stopped

NATO attempts at denying Russia its second strike nuclear capability. A deterioration in the relationship between NATO and Russia, or further competition with the U.S., can therefore have direct effect on the situation in the High North. The contested character of this environment is fluid, and attempts at posturing and preparing for escalation could shift the regional balance of power.

Campaigning with partners in the High North

To grasp what the role of the Combined Norwegian–U.S. effort might be in the “fourth age of SOF,” specifically within the High North Theater, the following sections discuss how the aspects (i) *perspective*, (ii) *Conventional Military Capabilities*, (iii) *SOF Capabilities and Authorities*, (iv) *Development and Investments*, and (v) *Adversaries and Competitors* affects SOF.

Understanding how *perspective* plays a role requires an appreciation of how Norway and the U.S. view the threat landscape and emerging operating environment. How strategic decision makers perceive this will eventually determine the strategic objectives that SOF will have to support and how they operate.

As demonstrated, neither China nor Russia is actively seeking confrontation in the High North, making it a delicate balance for Norway and the U.S. between deterrence and assurance. A successful campaign is therefore just as much about restraint as it is about applying and showcasing force at the right time, depending on the situation and scenario. How Norway and the U.S. view the combination will not only determine the outcome of a potential conflict, but it will also set the tone for the partnership within this theater.

The 2022 U.S. National Security Strategy (NSS) and National Defence Strategy (NDS) reason that in order to deter attacks and aggression, the U.S. should combine its strength with its allies to achieve maximum effect.⁴¹ The approach is called *integrated deterrence*, referring to the U.S. operating its military in a linked manner with its allies and partners, across regions and domains, to advance overarching strategy priorities.⁴² Through the NSS and NDS, the U.S. promises to “redouble its efforts [...] and deepen its cooperation with like-minded partners” as well as shift from a strategy that is “U.S.-led and partner enabled” to one that is “partner-led and U.S. enabled.”⁴³

Although the pivot to strategic competition started before the Russian invasion of Ukraine in 2022, this event is largely driving and affecting contemporary security policy, both within the U.S. and for all NATO partners. Since the war in Ukraine broke out, NATO has published a Strategic Concept, proclaiming that “the Euro-Atlantic area is no longer at peace” and that “Russia has violated the norms and principles that contribute to a stable European security order.” The same document argues that “authoritarian actors are challenging all NATO members” and that states such as China and Russia “are investing in sophisticated military capabilities, with little transparency or regard for international norms and regulations.”⁴⁴

Member states are swiftly updating their national strategies and policies in accordance with the new security reality. In Norway, a recent whitepaper by a government appointed working group known as “the Defence Committee of 2021” concluded that Norwegian defense spending must increase in order to tackle the new operating environment, in particular the emerging threat from Russia.⁴⁵ The Norwegian Chief of

Defence has also published a document calling for significant expansion of the Norwegian Armed Forces due to the Russian invasion of Ukraine.⁴⁶

Although all seem to agree about the overarching security landscape, there are nuances within these strategic documents that affect how nations and organizations approach the issue. When dealing with asymmetric partnerships, the desired end state is expected to vary somewhat. The U.S. seeks to uphold status quo, wanting to maintain its role as the global hegemon in competition with China and Russia. Norway wants to avoid losing its sovereignty in case of increased Russian aggression. For Norway, this can entail taking on the role as theater and subject-matter experts of the High North, effectively shaping the combined approach to the High North-theater while being enabled by the U.S. Norway is experienced in striking the right balance between deterrence and assurance when it comes to Russia in the High North,⁴⁷ the U.S. “should pay attention and take notes.” Utilizing the existing SOF partnership to enhance these efforts will not only develop skills and knowledge at the tactical edge, but also the strategic objectives of each state, preventing uncontrolled escalation.

For the High North, it means the U.S. could benefit from leaning into the expertise and local knowledge of Norway to determine how to best achieve its objectives. Following this logic, High North operations should be combined, and an effort pursued in close cooperation with partners. This approach creates opportunities for Norway, which potentially will expand the military capabilities at Norwegian and Combined disposal. However, this also brings with it challenges, as the approach requires realignment and deeper coordination between the two nations.

Consequently, Norway together with the U.S. prioritize their military presence in the High North and are regularly conducting combined joint operations for Intelligence, Surveillance and Reconnaissance (ISR), training and deterrence purposes.⁴⁸ These efforts are primarily led by conventional forces, which possess platforms capable of covering vast areas and serving as a visible strategic deterrent. This was demonstrated in May 2023 when the U.S. sailed an aircraft carrier along the coast of Norway. This operation illustrate U.S. commitment to securing the High North, it also offered opportunity to conduct combined exercises that included the Norwegian Navy, Air Force and SOF.⁴⁹ Such activities allow both countries to overcome potential challenges in a pre-conflict setting and ensure that combined operations and interoperability is possible.

For SOF, this requires combined joint engagements with conventional assets in addition to SOF-to-SOF cooperation.⁵⁰ The requirement is very much a consequence of the character of the High North, with its vast areas of sea, harsh conditions, and limited infrastructure. Mobility and effects during conflict as well as credible levels of deterrence in peacetime will require conventional platforms. However, the knowledge, experience, and skills of SOF will allow them to enhance and harden these assets. Forward-deployed SOF in the High North can come to act as *integrators and enablers* in order to coordinate various activities involving the combined joint force.⁵¹ Allowing SOF to collaborate with conventional assets can effectively expand the reach as well as increase the overall access and speed of ongoing operations.

SOF should therefore be prepared to perform an indication and warning function in addition to serving as strategic shapers by supporting the combined joint force with access, placement and influence.⁵² Whereas the “third age of SOF” saw these units emphasize a *direct approach*, effective use in the “fourth age of SOF” will require more

indirect approaches able to create effects in the early phases of conflict and support efforts at integrated deterrence.⁵³ An indirect approach necessitates SOF operating in the cognitive realm, becoming masters of detecting and exploiting adversarial attempts at deception and influence. Utilizing SOF's small footprint and low signature can represent a credible military option, e.g. by detecting attempts at sabotage or changes to the pattern-of-life of adversarial forces.⁵⁴ By functioning as intelligence nodes and providing decision-making support, SOF can enable further action by others. In a conflict scenario involving high-intensity warfare, SOF can be directed at high-value targets within denied areas that are beyond the reach of the combined joint force, or at least provide targeting data and ISR to long-range fires operated by conventional forces.⁵⁵

Building these capabilities and ensuring interoperability between allied assets will increase efforts generating *integrated deterrence* within the High North theater and the likelihood of success during a conflict. When utilizing SOF to support or conduct missions associated with conventional forces, risk of failure is reduced and the overall effect increased; which enables SOF to better inform geographic combatant commands and national decision-makers, consequently decreasing the fog of war and expanding military options available to commanders.

In 2021, the need for a combined and partnered approach reached the policy level when the Norwegian Defence Minister and the U.S. Secretary of Defense signed a "Bilateral roadmap for Special Operations Cooperation."⁵⁶ Although details of this roadmap are unknown to the public, its very existence tells the story of closer realignment and attempts at coordinating the combined SOF effort between the two countries, before vertical escalation occurs and reaches undesirable levels. Herein lies the potential for combined SOF activity, as Norwegian and U.S. SOF have a proven track record of working together in an integrated manner e.g. both nations regularly conduct combined training and exercises in the High North.⁵⁷ Integration and alignment such as this is imperative as it can ensure mutual understanding of respective doctrines, capabilities, and size. What Norwegian and U.S. SOF are authorized to do and how they understand and read a situation will vary, but overcoming these obstacles and being able to operate in a combined manner starts with integration and building trust.⁵⁸ Ensuring that Norwegian and U.S. SOF collaboration in the High North upholds the approach of being "partner-led" can therefore help meet the desired end state of *integrated deterrence*.

Norwegian SOF will not only be able to assist with Arctic and High North subject matter expertise, but they will also be able to provide local insight that can expand U.S. situational awareness and regional understanding, which got the potential of strengthening the relationship between the units as well as decision-makers, establishing formal and informal networks that can be leveraged in times of crisis or conflict. Ensuring mutual understanding and shared experiences through training and exercises will not only bolster the cultural ties between SOF, but is a cost-effective way to improve the capabilities and expertise of operators without the need for large-scale deployments.⁵⁹

In addition to building trust between SOF and integrating and enabling collaboration with the combined joint force, a key success factor for partnered campaigns in the High North is continued *bilateral capability development*.⁶⁰ The High North environment requires capabilities, platforms, and equipment able to withstand harsh, wet, and cold environments and differs from experiences built in the "third age of SOF." SOF will not only need

capabilities expanding their survivability and mobility, but as demonstrated in the preceding section; they will also be required to operate with low signature in a theater characterized by state-centric threats. In order to obtain combined situational awareness and be capable of sharing information and coordinate the relevant effects at the right time, interoperability across the tactical, operational, and strategic level is critical. These efforts can range from implementing new technologies in the existing force-structure to adapting plans and existing platforms to the High North, as well as ensuring operators are familiar with this environment, e.g. through combined training and exercises.⁶¹

Efforts at developing SOF peculiar capabilities for the High North was recently demonstrated through live firing of the first experimental Joint-Air-to-Surface Standoff Missile at a range in Norway, a cooperation between the U.S. Air Force and Special Operations Command Europe.⁶² Norway is also acquiring Maritime SOF vessels via a foreign-military-sale, as announced by the U.S. Department of Defence.⁶³ Additionally, during the winter of 2023, Norway hosted an event where technology vendors and international SOF partners were invited to experiment with SOF peculiar technology in a cold weather environment.⁶⁴

Norway also collaborates with the Science and Technology (S&T) Directorate of USSOCOM. Specifically, Norwegian Special Operations Command and the Norwegian Defence Research Establishment (FFI) have partnered with USSOCOM S&T on an “innovation cycle” set to identify concepts and capabilities to enhance communication in austere and contested environments.⁶⁵ This effort aims to support future combined operations and focuses on identifying and implementing new and innovative solutions for SOF. As demonstrated, existing SOF capability development efforts between Norway and the U.S. are not only focused on acquiring and experimenting with mature and battle-tested technologies but are also looking to identify new and emerging technologies and concepts able to disrupt contemporary understandings of how special operations are to be conducted in the “fourth age of SOF.” These efforts could help increase technological and operational interoperability between Norwegian and U.S. SOF.

Although the aspects discussed above will play a part in determining whether an allied campaign in the High North is a success, the actions, intentions, and capabilities of adversaries and competitors will have a shaping effect in defining what a potential conflict will look like. If conflict remains below the threshold of war, the role of SOF will be significantly different compared to conflict escalation and high-intensity warfare. If the combined Norwegian—U.S. SOF effort within the High North is to be effective in peace, crisis, and conflict, they must have the ability to impose costs outweighing any perceived benefit by the adversary. By being present in this theater, working with the conventional combined joint force as well as strengthening interoperability and integrating efforts that expand the reach and effect of Norwegian and U.S. forces, SOF will be better able to support the strategic objectives of both states in the eventuality of a military campaign in High North.

Conclusions

The article set out to investigate *what a successful Norwegian—U.S. SOF partnership looks like in the emerging High North theater*. As demonstrated, finding an answer to this is neither easy nor straightforward, as it requires context that depends on specific situations as well as policymakers’ ambition and guidance. The High North-context

contains a broad array of military instruments, a wide set of actors, interests, and potential conflict scenarios, making the task at hand daunting.

The “fourth age of SOF” will potentially require engagements in theaters and environments beyond the High North, and there will be a need to prioritize. Resource allocation that allows for a “perfect campaigning solution” is unlikely, and recommendations for one theater may involve sacrifices elsewhere. Dealing with such complexity led the article to focus on five aspects deemed important for understanding and defining the role of SOF. These aspects were (i) *Perspective*, (ii) *Conventional Military Capabilities*, (iii) *SOF Capabilities and Authorities*, (iv) *Development and Investments*, and (v) *Adversaries and Competitors*.

First, succeeding very much depends on the *perspective* one takes when analyzing the threat and research question, as *success* is not necessarily the same for Norway as it is for the U.S. From a Norwegian point of view, regional security in northern Europe and upholding sovereignty in the High North is top priority. Upholding sovereignty includes credible and managed deterrence in the pre-conflict stage as well as ensuring the ability to engage and defeat the adversary in case of escalation. For the U.S., the High North is nothing but a small piece in a larger ongoing strategic competition pertaining to global security. These perspectives will affect burden sharing and guidance from policymakers as well as risk appetite and management. When collaborating, both parties must be aware of these peculiarities in order to identify areas where combined efforts are acceptable. Being a small and trusted ally allows Norway to take regional responsibility while simultaneously supporting the global ambition of its U.S. partner. In the pre-conflict stage, Norwegian SOF can enhance this effect by being present, providing situational awareness and regional subject matter expertise. At the same time, the U.S. will be able to augment these efforts by leaning into and integrating its efforts with Norway, thus allowing both parties to reach its objectives regardless of nuanced perspectives.

Second, the character of the High North dictates that access to and availability of *conventional military capabilities* will determine the outcome of integrated deterrence in the pre-conflict phase as well as during conflict. The availability of these assets depends on prioritization and resources. If conventional forces and SOF are unaligned in time and space, *succeeding* in the High North will be unfeasible. Conflict with a near-peer adversary requires commitment of platforms and capabilities beyond SOF. The problem complex of the High North is too big of a challenge and too extensive to be handled by SOF alone, with few, if any, quick fixes. Consequently, the High North requires an integrated response and realistic commitment, starting in the pre-conflict stage with follow-through in case of escalation. The Combined SOF effort of Norway and the U.S. will have to find ways to enhance and support these objectives and to embed themselves in the larger campaign, be it in a pre-conflict stage or in an escalated situation. Executing special operations in the High North cannot be done in an isolated manner, and success will depend on the availability and integrated effort of the conventional combined joint force.

Third, a successful SOF partnership in the High North will depend on what these units are *capable, willing, and authorized* to do. Differences between Norwegian and U.S. SOF in everything ranging from doctrine, capabilities, and size is therefore imperative. These contrasts will warrant that U.S. and Norwegian SOF at times operate with

somewhat different guidance, mandate and authorities. Overcoming this will require integration and alignment. Continued trust building is critical, especially when working with interagency partners. SOF from both nations must be conscious of not overstepping boundaries and not assume risk on behalf of other entities, which implies accepting that a special operation in the European High North differs from other theaters. Specifically, this theater will require SOF to take on a supporting role and missions closely affiliated with conventional military activity. This integration necessitates prioritized collaboration across the tactical, operational, and strategic level as well as ensuring regular engagements between decision-makers. Focusing on interdependence as well as operational and technical interoperability with the combined joint force can enable a successful SOF campaign.

The fourth aspect determining success is how much time and resources are allocated to *developing niche capabilities and expertise* aimed at operating in this theater. The High North will test the endurance and survivability of anyone attempting to maneuver and operate within it. To overcome the challenge will require investments allowing for capabilities, equipment, nutrition, infrastructure, and command and control (C2), not to mention *people* able to function and operate in these extreme conditions. Much of this will be expensive, costing both time and money. For the U.S., this will require sticking to the strategic message of the NDS allowing for a “partner-led” initiative by their Norwegian counterparts, who by way of their geographic location are subject matter experts able to define contemporary and emerging requirements. Continued prioritization of bilateral capability development, small unit exchange, combined training, exercises, and development of plans will enhance the overall effect of the SOF partnership.

Lastly, *succeeding* depends on the intentions and capabilities of *adversaries and competitors*. Russia has overtly revealed its hand, ambitions, and lack of ethical standards in its war against Ukraine. As such, it represents the greatest potential threat to the High North. China has chosen a more covert and indirect approach, remaining below the threshold of conflict. For the time being, both are avoiding unhindered escalation within this theater and are pursuing stability and status quo. However, as we have seen in numerous instances over the last decade, things can quickly change. The way in which these actors chose to generate challenges and compete with their western counterparts will therefore determine the intensity and specific conflict scenario facing the High North. From a military perspective, some of these challenges will require SOF in order to effectively counter and deter threats. A SOF partnership must be able to handle these challenges and scenarios, ranging from below-threshold activity to escalated war-like situations. Determining how these scenarios will manifest and working diligently and bilaterally will increase the likelihood of successes in the High North, for both SOF as well as the combined joint force.

Although not an exhaustive list, these five aspects exemplify the potential utility and function of a combined Norwegian–U.S. SOF partnership within the High North. The proposed actions imply somewhat of a reorientation of how these units should be equipped, trained, and coordinated with the strategic objectives they will have to support. The “fourth age of SOF” differs from the preceding “third age,” as it spans other theaters and re-introduces state-centric threats and below-threshold activities.

SOF will not be the main fighting force should conflict occur in the High North, and they must adapt in order to remain relevant. Failing to prioritize these aspects could lead to a regional power vacuum as well as degenerate and hinder the interoperability required to deter and defeat an adversary both within and beyond the High North.

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