

Hybrid Warfare and Special Operations Forces

This paper explores the role of Special Operations Forces (SOF) within the realm of hybrid warfare. It posits that the distinct characteristics and expertise of SOF render them an exceptionally valuable asset in the context of hybrid warfare. The growth of SOF units over the past two decades and their increasing involvement in various conflicts can be attributed to this unique utility. It is foreseeable that this trend will persist, with the SOF increasingly assuming a central role in the domain of hybrid warfare. On the official NATO website, hybrid threat is defined thus: “Hybrid threats combine military and nonmilitary as well as covert and overt means, including disinformation, cyberattacks, economic pressure, deployment of irregular armed groups and use of regular forces. Hybrid methods are used to blur the lines between war and peace, and attempt to sow doubt in the minds of target populations. They aim to destabilize and undermine societies. The speed, scale and intensity of hybrid threats have increased in recent years. Being prepared to prevent, counter and respond to hybrid attacks, whether by state or non-state actors, is a top priority for NATO.”² The European Centre of Excellence for Countering Hybrid Warfare defines hybrid warfare as “an action conducted by state or non-state actors, whose goal is to undermine or harm a target by influencing its decision making at the local, regional, state or institutional level. Such actions are coordinated and synchronized and deliberately target democratic states’ and institutions’ vulnerabilities. [...] Hybrid action is characterized by ambiguity as hybrid actors blur the usual borders of international politics and operate in the interfaces between external and internal, legal and illegal, and peace and war. The ambiguity is created by combining conventional and unconventional means – disinformation and interference in political debate or elections, critical infrastructure disturbances or attacks, cyber operations, different forms of criminal activities and, finally, an asymmetric use

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² NATO 2021.

of military means and warfare”.³ As noted above, the term hybrid warfare as it is most commonly used today refers to two separate phenomena.⁴

On the political-strategic continuum the concept termed hybrid warfare refers to the combined use of all the tools available to the belligerents to force their rival to accept their political demands – all forms of aggressive diplomacy, economic actions, psychological and information actions and violent actions. All these may include a mix of overt and covert actions. As regards the acts of violence, these may be official (declared war) or unofficial (undeclared war).

Within the internal continuum of conducting war (methods of conducting violent operations) hybrid warfare refers to the combined use of the different manners of military action, both regular warfare and irregular warfare.

Considering the two aforementioned aspects of hybrid warfare, SOF offer a compelling value proposition for decision-makers. They are well-equipped to confront the array of challenges presented by hybrid warfare. SOF can effectively participate in or counter information campaigns and psychological warfare. While they are part of the regular army, they excel in the realm of irregular warfare. Despite continuous downsizing over the past two decades, which only reversed with the Russian invasion of Ukraine in February 2022, the armed forces of industrial democracies have experienced a remarkable expansion in terms of SOF. There have been increases in personnel, units, commands and supporting forces, as well as increased budgets and expanded roles. The rapid growth of SOF in the last two decades has been truly exceptional. The growth of SOF should be understood as part of a range of broader military innovations and adoptions including the use of drone units, cyber forces, judicial experts, media specialists and human terrain officers (to mention only a few). SOF have become so effective because they develop in conjunction with other military innovations that enable them to meet the challenges of the changed environments armed forces are facing today. In contrast to other military units that specialise in at most one or two specific sets of expertise, SOF are specialised generalists as they possess extremely varied abilities for action in a variety of fields straddling high and low intensity engagements, nation-building and humanitarian missions, or training indigenous forces and liaising with other national forces.⁵ In today's hybrid complex environment, the specialised generalists of SOF units

³ Hybrid CoE s. a.

⁴ HECHT 2024.

⁵ LUJÁN 2013; HARKINS 2015.

are increasingly attached to a variety of other military forces, governmental and non-governmental appendages and local civilian communities.⁶ They link the tactical to the operational and strategic levels in a uniquely active way.⁷ They are, to build on a current metaphor, ‘strategic corporals’⁸ whose tactical actions can have a much bigger impact on the strategic outcome. However, a word of caution is required. SOF are not to be regarded as ‘the’ solution – some ‘surefire’ key – to all military problems. Far from it. Nevertheless, in today’s world they seem to offer some adaptive advantages that, organisationally speaking, are unique. It is these perceived advantages that have been used in a number of ways. In short, the adaptive potential of SOF means are being constantly used by military and civilian leaders.

Definition and evolution

Given the contested definitions of these units, they are variously called Commandos, Special Forces or indeed SOF.⁹ Therefore, we need to present a clear definition of what we mean by SOF. When we use the term SOF here, we are referring to units trained to operate in small teams, behind enemy lines, utilising a wide range of resources, equipment and technology, which can generate special capabilities that provide innovative solutions to highly problematic circumstances.¹⁰ In addition, all SOF units consist of very high quality personnel, selected through rigorous tests and trials, and trained intensively over long periods.¹¹ Finally, they often report directly to senior command. Examples of such forces are Delta Force, Navy SEALs and the Green Berets in the U.S., the Special Air Service (SAS) and the Special Boat Service (SBS) in the United Kingdom, and Sayeret Matkal, Naval Commando and Shaldag in Israel. The first special operation forces in the history of modern warfare were created during the Second World War. Realising the importance of sabotage and reconnaissance missions carried out by small specialised forces, all major participants created special units of some sort.

⁶ LUJÁN 2013; HARKINS 2015.

⁷ ADAMS 1998; SPULAK 2007; TURNLEY 2011.

⁸ KRULAK 1999.

⁹ LAST 2004.

¹⁰ MARQUIS 1997.

¹¹ MARQUIS 1997: 48–55; LUJÁN 2013: 24.

The German Army founded the Brandenburgers regiments, which contributed to the campaigns in Poland (1939), the Netherlands and France (1940).¹² The British Army, a leader in this area, established the Special Operations Executive (SOE) in July 1940 after the fall of France,¹³ followed by the Special Boat Service (SBS) and the Special Air Service (SAS).¹⁴ The French Commandos Marine was also founded in 1940. At the end of 1942, the U.S. Navy also began forming beach reconnaissance forces, which later evolved into the Navy SEALs.¹⁵ After the war, SOF were created in many militaries.¹⁶ The original tasks given to SOF during WWII were relatively narrow in scope, focusing on reconnaissance, sabotage and partisan activities behind enemy lines. But as the nature of warfare changed in the second half of the 20th century, the range of SOF missions broadened and diversified. SOF were used for counterinsurgency operations and nation-building operations, most frequently in areas of Cold War conflict.¹⁷ Along these lines, SOF were deployed for protracted periods as small units among civilian populations – operating as pacification forces or in cooperation with local military units – and a growing emphasis was given to cultural awareness, regional orientation and language proficiency. In the 1980s and especially in the 1990s, SOF were restructured in many armed forces around the globe. One important change was the creation of command headquarters to synchronise the activities of special units from different branches.¹⁸ The United States Special Operations Command (USSOCOM) and the United Kingdom Special Forces (UKSF) headquarters were both established in 1987, and the French Special Operations Command (COS) was created in 1992. Since 9/11 there has been an ever-greater broadening of SOF activities and SOF have been spearheading the global war on terror.¹⁹ Furthermore, the increasing reliance on SOF and Special Forces Commands has been accompanied by greater participation in civilian operations in addition to standard military missions. Accordingly, SOF commands have infiltrated the cyber warfare and digital information arena while

¹² WILLIAMSON 2009.

¹³ SEAMAN 2006.

¹⁴ ROBINSON 2004.

¹⁵ SHIMRON 2007.

¹⁶ EXUM 2012; RYAN et al. 2003.

¹⁷ TENENBAUM 2016; JONES 2001.

¹⁸ ROBINSON 2013: 8–9; TURSE 2014.

¹⁹ KIRAS 2007.

enhancing interagency cooperation for an ever-widening scope of activity.²⁰ Among the main missions with which the SOF of the United States are charged are counterterrorism, counterinsurgency, counter proliferation of WMD, special reconnaissance, direct action, unconventional warfare, information operations, military information support operations, psychological operations, civil affairs operations, security force assistance and foreign internal defence.²¹ These are often broken down into two groups by the SOF community – Direct Action (comprised of Direct Action, Special Reconnaissance, Counterterrorism and Counter Proliferation) and Unconventional Warfare (Unconventional Warfare, Foreign Internal Defence, Civil Affairs, Psychological Operations and Information Operations). In the U.S., for example, the former is traditionally entrusted to the ‘Black’ SOF (Delta, Seal Team 6 [DEVGRU] and CIA SMUs) and the latter to the ‘White’ SOF units (75th Rangers, Green Berets, Navy SEALs, 160th SOAR, and the recent addition of the Marine Corps Special Operations Companies and Foreign Training Units).²² In fact, SOF have participated in a variety of other circumstances including, for example, humanitarian missions, disaster relief,²³ peacekeeping and stability operations, nation-building, Combat Search and Rescue, security assistance, counter-drug-trafficking and hostage rescue operations.²⁴ Specific forces may, however, be responsible for any combination of all or (more commonly) some of these missions. In addition, within the repertoire of any one unit, there is usually some kind of specialisation. And finally, on a global scope, a division of labour between the SOF of different nations with those of smaller countries can be identified, with the latter filling roles that differ from those carried out by the U.S. SOF. The American SOF community experienced an all-time low in the decade following the Vietnam War. Special Operations Forces had a very limited use in NATO’s main war scenario of a massive conventional armoured confrontation in Central Europe. The disastrous outcome of Operation Eagle Claw²⁵ (also known as Operation Rice Bowl) made it clear to both the American public and policymakers that SOF capabilities were

²⁰ McLEARY 2013.

²¹ HORN 2004.

²² JACKSON–LONG 2009: 136–137, 139.

²³ SHULTZ et al. 1995: 161, 203, 210.

²⁴ HORN 2004.

²⁵ On 24 April 1980, an ill-fated military operation to rescue the 66 American hostages held in Tehran ended with eight U.S. servicemen dead and no hostages rescued.

in desperate need of an overhaul.²⁶ The Holloway Commission report established a joint SOF directive that led to the birth of JSOC (Joint Special Operations Command). The growing acknowledgment that low-intensity conflicts (such as liberation wars, often supported by the Soviet Union) and terrorism pose widespread threats to U.S. security led to legislative action culminating in the Goldwater–Nichols Defense Reorganization Act of 1986. This led in turn to the birth of the United States Special Operations Command (USSOCOM) in 1987, in which JSOC was integrated as a Direct Action directive. In 1989, under Major Force Program 11,²⁷ the SOF dependence on parent services was finally overridden, allowing SOCOM, led by a four-star general, to enjoy an autonomous acquisition. During the past decade and a half, SOCOM has gained significant status through the efforts of SOF against terrorist organisations and especially since it was chosen to spearhead the Global War on Terror (GWOT). The budget and personnel of USSOCOM have risen accordingly.²⁸ In recent decades USSOCOM's total manpower has also grown dramatically – especially since 2005, when it was established as a mainstay of the War on Terror.²⁹ From about 33,000 personnel in 2001, numbers steadily rose to about 72,000 troops by the end of 2013.³⁰ Since 9/11 demand for special operations capabilities in the United Kingdom has also increased dramatically.³¹ Accordingly, two additional units were formed, the Special Reconnaissance Regiment (SRR) in 2005 and the Special Forces Support Group (SFSG) in 2006. These were added to the already existing SAS and SBS regiments, thus doubling the number of active units in United Kingdom Special Forces (UKSF). In recent years, while British military forces have undergone financial cuts as a result of the 2010 Strategic Defence and Security Review,³² the role of Special Forces in future British military strategy has been highly emphasised and appropriately compensated. The 2010 Review stated that the reputation of the country's SOF is widely acknowledged and therefore the size of the units is to be sustained and their support capabilities enhanced.³³ France also increased its interest in special operations over the past

²⁶ MARQUIS 1997: 69–73.

²⁷ JACKSON–LONG 2009: 142–143.

²⁸ USSOCOM 2014.

²⁹ USSOCOM 2008: 8–22; ROBINSON 2013: 17–18.

³⁰ MCLEARY 2013.

³¹ USSOCOM 2002: 17.

³² SIPRI 2013: 187.

³³ U.K. Ministry of Defence 2010: 27, 60.

decade and a half. In 2002, the French Army Special Forces Brigade was established, creating a framework for older SF units. They include the 1st Marine Infantry Parachute Regiment (the French SAS, established as the commando unit of the Free France army during World War II), the 13th Parachute Dragoon Regiment (whose history dates back to the 17th century), and the relatively new 4th Helicopter Regiment, which supplements the Army Special Forces Brigade as well as the other Special Operations Command units (*Commandement des Opérations Spéciales*), such as the French Navy Commandos and the Air Force's Parachute Commandos. More recently, special operations, along with cyber and information services, received further attention because of the growing awareness of low-intensity conflicts.³⁴ The French White Paper (Livre Blanc) published in 2013 stated: "The Special Forces have proven to be an element of utmost importance in all recent operations. Their personnel and command resources will be reinforced, along with their capacity for coordination with the intelligence services."³⁵ Israeli awareness of commando operations dates back to pre-independence days with Orde Wingate's Special Night Squads. The establishment of Unit 101 in 1953 was a benchmark event in Israel.³⁶ Specialising in small-scale guerrilla warfare, Unit 101 was created to carry out the retaliatory policy of Prime Minister David Ben-Gurion and Chief of Staff Moshe Dayan against paramilitary Arab insurgents. In 1957, a new Israeli unit was formed in the spirit of the British SAS, later known as Sayeret Matkal. While originally formulated for special reconnaissance missions, the unit mastered other capabilities and expanded its roles, as exhibited in Operation Bulmus 6 (the raid on Green Island), the Sabena Flight 571 hostage rescue, Operation Aviv-Ne'urim and Operation Entebbe. Over time, senior decision-makers reached the conclusion that a military-wide framework for special operations was needed. Hence, especially with the rising threat of Jihadist terrorist organisations, the Depth Corps was established in 2011 with the responsibility of carrying out operations deep within hostile territory and maximising the efficiency of the IDF's various SOF units.³⁷ More recently, the IDF established a new commando brigade (the 89th Brigade) that brings together four elite special purpose units.³⁸

³⁴ U.K. Ministry of Defence 2010: 66–68.

³⁵ Ministère de la Défense 2013.

³⁶ HENDEL 2007: 32.

³⁷ OREN 2011.

³⁸ ZITUN 2015.

The changing environments of armed conflicts

How can we explain the growing popularity of SOF? The main explanation emanates from the contemporary characteristics of armed conflict and the hybrid wars of our era. These hybrid wars include opponents organised in a variety of forms (regular armies, terror networks, criminal gangs, or local warlords) in regional conflicts. Moreover, these conflicts pose a very broad set of concrete challenges and missions such as anti-terror, anti-insurgency, policing, working with indigenous forces, humanitarian tasks, civil administration, or rebuilding infrastructure (to mention just a few). Accordingly, the argument goes, SOF are uniquely suited to participating in such conflicts because of their diverse capabilities and ability to quickly adapt to local conditions.³⁹ The second explanation focuses on domestic developments. The advent of what Luttwak⁴⁰ calls post-heroic warfare and Shaw⁴¹ names the ‘New Western Way of War’ in the industrial democracies refers to new expectations about how armed struggles are to be pursued. These expectations derive from risk aversion, implying lower acceptance of casualties primarily on ‘our’ side and to a lesser degree on ‘their’ side⁴² and buttressed by a global network of human rights and humanitarian movements calling for much greater precision in the use of military force. This kind of explanation categorises the use of SOF along with new forms of technology (precision-guided munitions) and advanced methods for gathering intelligence (SIGINT and drones, for example) as part of the growing importance of precision warfare and the shift of the armed forces from a ‘shooting’ to a ‘sensing’ organisation.⁴³ Thus SOF represents the potential for covert missions that lower risks to governments and precision warfare that lowers casualty rates for all sides in armed conflict. Another advantage of SOF in today’s conflicts has to do with what Shaw⁴⁴ calls Global Surveillance – that is, the monitoring of armed actions by new judicial regimes, local, national and global media, politicians, NGOs, humanitarian movements, or any camera-wielding civilian. The point here

³⁹ SPULAK 2007; TURNLEY 2011: 48; LESLAU 2010.

⁴⁰ LUTTWAK 1995.

⁴¹ SHAW 2005.

⁴² The literature shows that sensitivity is contingent by various conditions but it continues to be a factor in democratic decision-making, see SMITH 2005: 487–512; COKER 2002; LEVY 2009: 69–82; SHAW 2005: 97–98.

⁴³ ARQUILLA 2010.

⁴⁴ SHAW 2005.

is that the armed forces have become much more transparent than they were in the past and hence are constantly struggling over their professional autonomy.⁴⁵ In other words, Global Surveillance implies a constant encroachment on the armed forces in terms of their (relative) freedom or discretion to decide not only about personnel issues and procurement but, much more importantly, operational matters. As a result, the new circumstances in the theatres of conflict around the globe have led to an even greater emphasis on discretion and deniability. Here, SOF, with their high level of professionalism, ability to work covertly, and small size offer a distinct advantage to the militaries of the industrial democracies.⁴⁶ The strength of external surveillance over the armed forces is unparalleled in history. It is in this light that the advantage of SOF should be seen.⁴⁷ Each of these explanations contends that SOF are a form of organisational adaptation to the new international and domestic environments within which the armed forces operate. The establishment and expansion of SOF thus seems a reasonable move in terms of organisational adaptation to the accumulated influence of all these global and domestic processes.

Adaptive advantage

Despite cutbacks in forces since the end of the Cold War, during the past two or so decades, militaries have actually seen a significant enlargement, augmentation, or invention of a host of units and organisations. Alongside SOF we find a flowering of assorted functions that include drone units,⁴⁸ cyber forces,⁴⁹ intelligence apparatuses,⁵⁰ judicial arms,⁵¹ spokespersons and media relations functionaries⁵² and various kinds of experts, including organisational

⁴⁵ SHAMIR – BEN-ARI 2018: 335–354; FORSTER 2012: 273–290; RUBIN 2002: 36–57; VERHOEST et al. 2004: 101–118.

⁴⁶ HORN 2004: 5–6.

⁴⁷ GELPI et al. 2006: 7–46; GELPI et al. 2009.

⁴⁸ PARSONS 2013; SPRINGER 2013.

⁴⁹ RID 2012: 5–32; EVEN – SIMAN-TOV 2011: 15–32.

⁵⁰ FORRESTER 2014; PECHT–TISHLER 2015.

⁵¹ COHEN – BEN-ARI 2014; DICKINSON 2010: 1–28; LUBAN 2012.

⁵² BET-EL 2009: 65–80.

consultants,⁵³ translators,⁵⁴ Human Terrain Systems teams⁵⁵ or CIMIC officers.⁵⁶ What appears to be happening is that the long historical processes of internal military differentiation and specialisation have intensified and broadened since the 1990s⁵⁷ to include the development of various organisational capabilities in specific departments, units, or roles. All these new or renewed organisational capabilities seek to address the wider political, economic, social, technological and legal changes charted out in the previous section and can be seen as adaptive innovations to demands placed on the armed forces that expand their ability to meet a plethora of external threats and risks.⁵⁸ SOF are part of this trend, but they are also different from other specialisations that have emerged or expanded in recent decades. SOF not only embody various specialties in and of themselves but also possess an ability to put together specialists in unique ways that link them, in a very different way from other specialisations, to the top levels of the military and political hierarchy. The following section explores the adaptive features of SOF that render them exceptionally valuable in the context of hybrid warfare. First, on the most basic level, SOF have a very wide variety of conventional and non-conventional capacities providing a range of responses to a broad spectrum of challenges posed by today's conflicts.⁵⁹ Even a small SOF unit can offer as large a range of capabilities as a much bigger conventional unit. In fact, SOF training focuses on specialising in a wide variety of missions, roles and capabilities. Their ability to master a broad range of missions stems from the high quality of their recruits, intense processes of selection, and years of service.⁶⁰ Their constant use in operations reinforces knowledge creation and self-confidence. In taking up these roles, operatives display an impressive array of skills such as communication skills, the ability to quickly join and detach from other units and civilian bodies, the ability to 'see the big picture', and the ability to master diverse areas of knowledge. Thus, they can be characterised as 'specialised generalists' who offer a multitude of adaptive solutions to militaries.⁶¹

⁵³ JOHNSON 2002: 233–241.

⁵⁴ FOOTITT 2012: 1–11.

⁵⁵ FAWCETT 2009.

⁵⁶ LLOYD – VAN DYK 2007: 68–94.

⁵⁷ SHAMIR – BEN-ARI 2018: 314.

⁵⁸ WEBB 2013.

⁵⁹ SPULAK 2007.

⁶⁰ TURNLEY 2008; TURNLEY 2011.

⁶¹ SHAMIR – BEN-ARI 2018: 335–371.

As specialised generalists, SOF embody in their actions the central tensions of contemporary hybrid conflicts. Thus, for instance, SOF troops or units easily exemplify many of the mixed roles⁶² soldiers are tasked with today. They can be warrior-diplomats,⁶³ warrior-medical experts, or warrior-social workers.⁶⁴ In taking up these roles, they display a wide array of skills such as flexibility and the ability to quickly join with and detach from other units and civilian agencies such as NGOs, UN units of different nationalities, local communities, or indigenous forces – a skill that is much needed in hybrid conflicts. In other words, they take up a variety of roles as part of highly adaptable mixtures of alliances, coalitions, ad-hoc formations and temporary organisational shapes.⁶⁵ This skill set allows operatives to easily ally themselves with other specialised units that operate drones, analyse intelligence, perform logistical tasks and develop targeting packages for SOF. Thus, SOF can be described as experts at linking and integrating other specialisations. They have the knowledge to connect varied units within the military, such as, for example, identifying and attacking moving targets using real-time intelligence with a variety of assets such as drones or precision munitions.⁶⁶ Another distinct advantage of SOF is their connection to the senior command levels. They serve as a direct link connecting senior strategic command to tactical action. In this role SOF provide the senior command with effective tentacles for monitoring and understanding different environments and acting upon them. They are strategic corporals who have the potential to create strategic change.⁶⁷ It is no surprise, then, that many SOF officers rise through the ranks to become senior leaders.⁶⁸ Another significant aspect of SOF's contribution to hybrid warfare lies in the covert nature of many of their missions, which offers opportunities for plausible deniability in various forms. These include psychological operations (PSYOP), sabotage or decapitation operations. By definition, covert operations are conducted away from the public eye and many operations become public knowledge only after they have been accomplished and the political echelon decides to publicise the information (as in the raid on Osama bin Laden's hideout in 2011) or after a blunder or

⁶² BEN-ARI et al. 2010; SIMONS 2004: 79–92.

⁶³ BURKE 2009; TURNLEY 2011: 30.

⁶⁴ ROBINSON 2013: 12.

⁶⁵ DE WAARD – KRAMER 2010.

⁶⁶ LESLAU 2010: 520–521.

⁶⁷ SPULAK 2007; MILLER 1995: 38.

⁶⁸ KING 2015; BARASH–AMITAI 2007; ZONDER 2000: 10.

accident occurs (as in Operation Eagle Claw in Iran in 1980). The majority of SOF operations are planned, authorised and executed away from the public eye under conditions of secrecy. In contrast to deployments of regular units, very few individuals – including senior military leaders – know at any given moment the whereabouts of SOF units and the nature of the missions they plan and execute. Deniability refers to a situation in which political leaders can safely and believably deny knowledge of any particular truth because they are deliberately made unaware of it so as to shield them from responsibility associated with direct knowledge. Thus, SOF can, at times, carry out what would be considered illegal missions that are not officially sanctioned by governments so that they, who usually benefit from such missions, can safely disavow any knowledge of them in the event of their publicly uncovered success or failure. In other cases, governments may simply offer no public comment about the actions of SOF. Finally, an additional adaptive advantage of SOF is their role as testing grounds for experimentation and the initial implementation of new technologies, doctrines and practices. For instance, a significant portion of new weaponry, equipment and operational methods undergo their initial introduction and rigorous testing within these units. Once refined and improved, much of the equipment and many of the innovative procedures are subsequently disseminated to the broader ‘conventional’ formations.⁶⁹

A cautionary note

While SOF represent the many advantages we have outlined, they may also be at times counter-adaptive. One such danger centres on SOF falling prey to their own purported successes (buttressed and cultivated through thriving formal and informal public relations and marketing efforts).⁷⁰ The standing of many such units in the armed forces of the industrial democracies has grown to mythical proportions that may hide their limitations. This might lead politicians and senior military commanders to overestimate what they can achieve. One study found that policy-makers and opinion-leaders “ascribe exceptionally high importance to special operations compared to other military capabilities”.⁷¹ Indeed, a belief in

⁶⁹ SPULAK 2007; HENDEL 2007; KING 2013.

⁷⁰ LESLAU 2010: 526.

⁷¹ LAST-THORNBURN 2004: 2.

the superior abilities of SOF *may* have led to a number of significant failures and disappointments.⁷² A partial list of such cases since the end of the Cold War would include SAS teams failing to locate the Scud missile launchers in Iraq in 1991 (some SAS members were captured or killed in these missions);⁷³ the disastrous raid of Delta Force and the Rangers in Somalia 1993 (the incident widely known as Black Hawk Down), which led to major international embarrassment and a U.S. retreat from the country;⁷⁴ the 2005 Operation Red Wings in Afghanistan, which culminated in a severe loss of human life;⁷⁵ and the failed attempt to rescue Luke Sommers in Yemen.⁷⁶ The Afghanistan efforts in 2001 have also been criticised for their overreliance on SOF (in coalition with local warlords) at the expense of deploying regular ground units, which enabled Osama bin Laden to escape and survive another decade.⁷⁷ The Israel Defense Forces (IDF) has been emphasising the development and deployment of SOF in recent decades.⁷⁸ But despite intensive use of SOF for gathering intelligence and conducting raids, their impact on the strategic outcome of major campaigns such as the Second Lebanon War (2006) or Protective Edge in Gaza (2014) has been all but negligible.⁷⁹ Their role in repelling the attack by Hamas on Israel on 7 October 2023, was indeed significant – but the subsequent Israeli counteroffensive into Gaza was primarily led by heavy armour and engineering units. Overemphasis on SOF can also lead to the neglect of regular forces in the competition for material and human resources.⁸⁰ Accordingly, in some European militaries a few SOF or Commando units are kept in good operational condition while the rest of the force is incapable of mounting serious combat missions.⁸¹ Examples include the British, German and French dependence on logistics, airlifting and intelligence provided by the U.S. during the 2011 NATO campaign in Libya⁸² and the French campaign in

⁷² HORN 2004: 8.

⁷³ McNAB 1993: 110–238.

⁷⁴ ALLARD 1995.

⁷⁵ LUTTRELL–ROBINSON 2007: 307.

⁷⁶ THOMPSON 2014.

⁷⁷ BARZILAI 2013; BERGEN 2009.

⁷⁸ SHAMIR–HECHT 2013.

⁷⁹ LESLAU 2010: 513, 526; HENDEL 2007: 36; PETRELLI 2012: 56–73.

⁸⁰ HORN 2004: 6–7.

⁸¹ BBC 2014.

⁸² MÖLLING 2011.

Mali.⁸³ Many of the units fielded by European armed forces in Iraq and Afghanistan were very capable conventional forces, but they were usually small in number and frequently comprised elite infantry units. Indeed, this trend may reinforce the mediocrity of regular forces that might be desperately needed in some scenarios of armed conflict. Because they are small in scale, the SOF lack mass, one of the great advantages of conventional units in terms of friction.⁸⁴ More widely, militaries are based on discipline that inculcates conformity and results in the certainty of command – the assurance that an order will be followed in a prescribed fashion every time.⁸⁵ In simple terms, conventional forces are often considered “reliable, disciplined, and predictable”.⁸⁶ Special Forces, on the other hand, do not always adhere to the same strict discipline as conventional units, which can make them more challenging to control from the perspective of many senior commanders. This, coupled with the culture of covert operations and plausible deniability, can give rise to what is known as “rogue units”.⁸⁷ One such case would be former SAS officer General David Richards’ campaign against the rebels in Sierra Leone, which secured the official regime that Richards felt was more favourable to the British national interest – despite his formal orders, which only required him to conduct limited evacuation operations.⁸⁸ This (relative) disregard may be exacerbated by the close connections between SOF and senior decision-makers. Given that SOF commanders have the attention of policymakers, they may wield disproportionate influence in shaping military priorities, not only with respect to budget allocation but also in the authorisation, selection and prioritisation of SOF missions. As a result, proximity and access to senior military and civilian leaders can have both adaptive and potentially maladaptive consequences.

⁸³ EARLANGER 2013.

⁸⁴ SPULAK 2007: 31.

⁸⁵ TURNLEY 2011: 54.

⁸⁶ LAST 2004: 37.

⁸⁷ AXE 2014.

⁸⁸ KING 2015.

Conclusion

This chapter has emphasised that Special Operations Forces (SOF) units are exceptionally well-equipped and effective in addressing the diverse challenges posed by contemporary hybrid warfare. The notable growth of SOF reflects how military organisations have had to adapt to ever-evolving hybrid environments. In contrast to other recent military organisational innovations, the significant value of SOF lies in their adaptability and role as specialised generalists. They provide the armed forces with the capability to link external and internal components to establish flexible formations. SOF not only excel in these roles but also represent compact units that, at times, can have a substantial impact through various forms of coordinated action. Within the context of broader organisational changes, SOF distinguish themselves by serving as field integrators who bridge the tactical, operational and strategic levels of action, thereby facilitating a combined effect of diverse systems and technologies. Consequently, SOF contributes by managing connections between the armed forces and external environments and integrating specialised functions. Furthermore, as units, they seamlessly blend thorough planning with improvisation, establish direct connections with a wide array of both military and non-military actors, and possess the capacity to act autonomously and clandestinely. Collectively, these distinct characteristics make SOF highly suitable for hybrid warfare.

Questions

1. What distinguishes SOF units?
2. What is the definition of SOF, and do you think alternative definitions could be applicable? Can you propose an alternative definition?
3. What factors contributed to the significant growth of SOF units and SOF organisations (such as SOF headquarters and commands) in the past two decades?
4. What are the primary key adaptive advantages of SOF?
5. What potential disadvantages or drawbacks might be associated with SOF?
6. Do you concur with the idea that SOF is the optimal tool for use in hybrid warfare? Please provide a detailed discussion.

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