

Strategy for a New Era: USSOCOM Takes on Strategic Competition

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ABSTRACT

In a new era of strategic competition, U.S. Special Operations Command (USSOCOM) must identify opportunities to outcompete China and Russia where and when it is most crucial, maintaining the U.S. technical edge and strategic advantage. USSOCOM needs a foundation for strategy and policy, along with approaches for achieving impact. The challenge for U.S. strategists is that maintaining the advantage over America's adversaries will be a costly and complex endeavor. While winning the counterterrorism fight could be done reasonably well with set resources, this is not the case for strategic competition, a decades-long effort potentially on the scale of the Cold War.

KEYWORDS

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In a new era of strategic competition, U.S. Special Operations Command (USSOCOM) must identify opportunities to outcompete China and Russia where and when it is most crucial, maintaining the U.S. technical edge and strategic advantage. USSOCOM needs a foundation for strategy and policy, along with approaches for achieving impact.

The future operating environment will be shaped by expansionist peer and near-peer adversaries, greater strategic competition among rival states, and emerging technologies. China and Russia are seeking to expand their global influence, transnational terrorist groups continue to maintain a presence in critical regions, and emerging technologies are shaping the environment in new ways.

Winning means successfully prevailing in the gray zone—below the level of armed conflict. However, USSOCOM's role extends beyond the gray zone; U.S. Special Operations Forces (SOF) must be ready to fight and win in support of partner nations and U.S. interests.

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The challenge for U.S. strategists is that maintaining the advantage over America's adversaries will be a costly and complex endeavor. While winning the counterterrorism fight could be done reasonably well with set resources, this is not the case for strategic competition—a decades-long competition and defense mobilization potentially on the scale of the Cold War. Strategists should focus on vital U.S. national interests while identifying the critical geographic regions and strategic assets—those that advance progress toward the 'ends' U.S. strategy seeks to accomplish.

USSOCOM can improve prospects for success. At the very least, USSOCOM can:

1. Identify geographic regions and assets of strategic value and place data in strategic context for leaders.
2. Set U.S. policy on gray zone competition and develop expertise.
3. Leverage strategic reviews and net assessments.

Prioritizing key geographic regions and assets according to their intrinsic strategic value will position SOF to outcompete China and Russia where it is needed most—whether for maintaining a strong posture in the gray zone, successfully deterring the outbreak of armed conflict, supporting U.S. allies, or preparing for future conflict with China and Russia. Strategists will gain a clear understanding of where it is most important to fight and win.

Better interpreting and contextualizing data and dashboards on strategic competition is vitally important. At a fundamental level, this means understanding how data and dashboard displays relate to U.S. national interests, grand strategy, and leadership decisions. Ideally, these displays and information feeds will differentiate top priorities from lesser concerns—making it clear where SOF must confront adversaries and what is at stake.

USSOCOM also needs to set policy on strategic competition in the gray zone—further defining acceptable competition for economic influence, natural resources, rare earth reserves, and control of global supply chains. A clear paradigm will better advance U.S. policy involving interagency and foreign partners. USSOCOM has already taken the initiative to develop expertise on strategic competition and escalation dynamics in the gray zone, improving prospects for success.

Finally, strategic reviews and net assessments will be crucial to success. Within this domain, the concept of return on investment is central—because strategy, at its core, involves choices about how to apply available resources to achieve desired ends. This will be critical for a potentially decades-long era of strategic competition that could draw down resources.

Overall, USSOCOM establishes the ends strategy strives to accomplish, characterizes the strategic setting, and selects the means to achieve desired ends. The process remains iterative, with strategic reviews and net assessments offering the opportunity to adjust strategy over time.

Finite Resources

America's resources are finite. Without a focus on key threats and high-value strategic assets, the U.S. will incur high costs in a new era of strategic competition. One can imagine several suboptimal outcomes:

- In the first scenario, the U.S. maintains the strategic advantage and technical edge, but at far higher cost than necessary.
- In the second scenario, the U.S. maintains the strategic advantage but fails to actualize this favorable posture to achieve America's global objectives.
- In the third scenario, U.S. resources applied to strategic competition have limited impact—resources that could have been better applied to rapidly acquiring new technology or fostering innovation.

In each scenario, America demonstrates limited strategic imagination, focusing on competing across all dimensions of national power instead of taking a transformative approach that leverages known patterns of adversary behavior and strategic culture. A resource-driven approach can only achieve so much. Policymakers often assume that by applying resources, a nation-state can achieve proportionate strategic impact; however, flawed assumptions can limit success.

In the gray zone, with no intrinsic start or finish, the U.S. risks a baseline level of expenditure without a guiding strategy—a situation with high potential for wasted resources. Ultimately, a lack of prioritization could lead to endless resource drain—possibly on the scale of the Cold War.

By competing with China and Russia globally without a clear hierarchy of objectives, the U.S. risks missing the opportunity to intensify resource application in vital regions where gray zone wins are imperative and additional resources mitigate risk. National security strategists can benefit from a clear starting point for crafting strategy in this new era—where counterterrorism remains essential but is no longer USSOCOM's primary mission, and advancing strategic competition becomes the priority.

USSOCOM in a New Era

Focusing on first-order U.S. national security interests enables strategists to develop useful end states when crafting SOF strategy. USSOCOM leadership has emphasized innovation, strengthening alliances, and excelling in the gray zone.¹ USSOCOM must also prepare for conflict, including aggression against U.S. allies or international partners, such as Ukraine. SOF's role in deterring great power rivals includes collecting intelligence, preparing the environment, and building strong partnerships.² The U.S. seeks to maintain its strategic advantage and technical edge over Russia and China while integrating deterrence and supporting allies. These efforts take place below the level of armed conflict but also above it, adversaries seek to initiate hostilities, further escalate, or set the stage for a broader conventional war or nuclear conflict.

Ultimately, the development of SOF capability must align with the National Security Strategy (NSS), the National Defense Strategy (NDS), and White House policy.³ Table 1

(Objectives in a New Era) summarizes the aims of the U.S. strategy. These goals are consistent with the National Defense Strategy (NDS). Aligning SOF activities with this structure clarifies the strategic trade-offs when choosing between resource allocations, force postures, or SOF capabilities.

With these objectives and end states established (as shown in Table 1), strategists must evaluate the relative value of focusing efforts to the left or right of the boom and the associated risk tolerance of each choice. As USSOCOM strives to counter China, strategists must carefully balance resources devoted to gray zone competition, conflict deterrence, or preparation for large-scale conventional war—without certainty that competition will remain in the gray zone indefinitely.

The Future Operating Environment

Strategists must size up the future operating environment—where SOF must fight and win. Understanding the regional dimensions of this environment will be particularly critical, and identifying U.S. strategic priorities by region is an excellent starting point.⁴ The 2022 NDS makes clear that a major U.S. defense priority will be “detering aggression, while being prepared to prevail in conflict when necessary, prioritizing the PRC challenge in the Indo-Pacific, then the Russia challenge in Europe.”⁵

Fundamental shifts are taking place in the structure of the international system, as prospects for a unipolar system guided by U.S. hegemony are diminishing. Some anticipate an increasingly multipolar world order, as Russia and China seek to exert political, military, and economic power and influence globally to attain the strategic and technical edge.⁶ Changes are overtaking other realms; observers predict large shifts in human geography, including greater migration, humanitarian crises, and increasing political instability. External trends like climate change will introduce unexpected challenges. Finally, advances in technology will shape the nature of strategic competition among rival great powers, each seeking to develop or maintain the technical edge.

Objectives in a New Era
<p>U.S. Advances Vital National Interests</p> <p>The U.S. secures vital national interests and maintains the American way of life, including democratic governance and a free civil society. The U.S. advances national goals as outlined in the 2018 and 2022 National Defense Strategies (NDS), emphasizing commitments to allies and partners, countering rival great powers in critical domains, and maintaining a strategic advantage. This includes deterring armed conflict, building robust integrated deterrence, and ensuring the capability to prevail in conflict with China in the Indo-Pacific or Russia in Europe.</p>
<p>U.S. Denies the Adversary</p> <p>In a new era of strategic competition, the U.S. denies adversaries:</p> <ul style="list-style-type: none">• Victory below the threshold of war (in the gray zone).• Victory through armed conflict (beyond the gray zone).• Victory through escalation to a large-scale conventional war or a nuclear conflict (beyond the gray zone).
<p>U.S. Maintains the Strategic Advantage</p> <p>The U.S. maintains a global strategic advantage by successfully contesting adversary power projection and securing strategic assets in critical theaters. This ensures the ability to prevail in future conflicts when and where needed most. The U.S. counters rival great powers, limiting Chinese and Russian efforts to project global military, political, and economic power at the expense of U.S. interests and regional security. Additionally, the U.S. prevents adversaries from gaining access to military bases, ports, strategic trade routes, rare earth reserves, and other assets of strategic value. The U.S. maintains a technical edge over adversaries, countering their exploitation of emerging technologies.</p>
<p>U.S. Deters the Outbreak of Armed Conflict</p> <p>The U.S. deters the outbreak of armed conflict, recognizing that this protects allies and vital interests abroad. More importantly, it recognizes that war among great powers, particularly escalation, presents an unacceptable risk.</p>
<p>U.S. Support to Partner Nations Deters Aggression</p> <p>U.S. military strength dissuades adversaries from aggression against allies and partners. With a commitment to protecting these nations, adversaries like China and Russia are deterred from resorting to conventional or nuclear conflict above the gray zone.</p>
<p>U.S. Integrated Deterrence Achieves Results</p> <p>U.S. integrated deterrence precludes large-scale conventional war or nuclear conflict. It limits the potential for a nuclear arms race or the development of technologies that could disrupt the nuclear balance or incentivize adversaries to consider using nuclear weapons.</p>
<p>U.S. Maintains the Technical Edge, Preserving America’s Ability to Fight and Win</p> <p>The U.S. competes with Russia and China in research, development, testing, and evaluation (RDT&E), maintaining a decisive technical edge. This ensures the ability to prevail in armed conflict or other forms of warfare, including cyber war.⁷</p>

Table 1: Objectives in a New Era ⁸

As Russia and China compete with the U.S., they will leverage technologies designed to bolster state security and counterterrorism. Smart Cities and Safe Cities initiatives, which include biometric and identity technologies, impose some limitations on U.S. activities, particularly in urban areas. USSOCOM must grasp how technology will shape the future of war and the nature of strategic competition. Broadly, SOF can expect to operate in denied environments⁹ and will likely observe changes in how strategic competition unfolds in the gray zone.¹⁰ Meanwhile, USSOCOM also needs to become increasingly integrated with the Joint Force. At the outset of this new era, SOF must ensure interoperability with conventional forces—as well as identify the geographic regions or types of operational environments most likely to require seamless integration with conventional forces to win on the battlefield or in the gray zone. As theorists of special operations have noted, concepts of special operations have evolved over time.¹¹ The present moment is critical for understanding how boundaries between SOF and conventional forces may be changing and for determining the missions, authorities, and capabilities these new challenges require.

The Joint Operating Environment 2035 identifies features of the operating environment that will introduce new challenges for SOF and the DoD: violent ideological competition; threatened U.S. territory and sovereignty; antagonistic geopolitical balancing; disrupted global commons; contest for cyberspace; and shattered and reordered regions.¹² To sum up, considerable change is taking place, bringing unpredictable developments in world affairs—Russian military losses in Ukraine, as a recent example. SOF's shift to strategic competition and the scaled-back counterterrorism (CT) mission are situated within this broader context. New challenges will abound.

Applying SOF Capabilities

SOF dedicated to Direct Action (DA) will continue to excel in this role; meanwhile, the enterprise will shift to a new focus on countering Russia and China. While placing renewed emphasis on maritime capabilities and technology, the broader objective will be a full return to the range of capabilities employed before the global war on terror. Ultimately, as the new era unfolds, several SOF core activities may take on a greater role.¹³

Security Force Assistance, Foreign Internal Defense. USSOCOM continues to emphasize the importance of supporting partner nations and U.S. allies.¹⁴ Security Force Assistance (SFA) and Foreign Internal Defense (FID)¹⁵ support allies while helping to maintain U.S. access, placement, and influence.¹⁶ Each core activity plays an important role in developing host nation capability to counter internal threats or defend against rival states. These activities also demonstrate U.S. resolve in support of allies, deterring adversaries from initiating armed conflict. They may also dissuade rival states from engineering a “fait accompli” in the gray zone.¹⁷

Countering Weapons of Mass Destruction (CWMD). USSOCOM should prioritize efforts to counter state and non-state attempts to acquire, develop, and deploy high-consequence chemical, biological, radiological, and nuclear weapons. Monitoring proliferation by China and Russia may become a greater focus. The U.S. may also seek to limit the diffusion of Chinese and Russian capabilities to non-weapon states or state sponsors of terrorism.¹⁸ Securing high-risk materials, technologies, and expertise—

particularly in regions experiencing violent extremist activity and accelerated competition with near-peer adversaries—would address critical challenges. Concerns persist about high-risk material in Ukraine following the 2022 Russian invasion and passage through Chernobyl and Zaporizhzhia.¹⁹

Civil Affairs. Special Operations Forces on Civil Affairs teams help build robust civil societies through interaction with community-level organizations and non-governmental groups. With language skills appropriate to their area of expertise, they often operate with considerable freedom of action. In addition to preparing the future operating environment, SOF can build resilience against Russian or Chinese aggression and create friendly networks in advance of anticipated armed conflict. Certain civil affairs initiatives can reach key interest groups in critical regions.²⁰

Military Information Support Operations (MISO). The U.S. can leverage MISO for strategic effect in priority geographic regions²¹—targeting key populations whose changing perceptions could have a significant impact on altering the operating environment to U.S. advantage.²² With expansive reach across the digital domain and at relatively low cost compared to other core activities, MISO offers opportunities to counter China and Russia in innovative ways. Ultimately, the deciding factor for any MISO campaign will be its capacity to generate strategic impact.²³

Humanitarian Assistance and Disaster Relief (HADR). U.S. humanitarian assistance and disaster relief (HADR) delivers critical aid to populations worldwide while advancing U.S. interests, such as promoting the rule of law, human rights, and stable democratic governance. Humanitarian assistance is another realm where the U.S. and SOF can outcompete Chinese and Russian bids for global influence—strengthening partnerships with U.S. allies in critical regions or limiting the radicalization of vulnerable populations.

Preparing the Environment. USSOCOM leadership continues to stress the value of SOF in preparing the environment for future armed conflict—an established role dating back to the Office of Strategic Services (OSS).²⁴ Surveillance and reconnaissance can generate intelligence on the future operating environment—vitally important in advance of conflict. Efforts to prepare the environment might also include a cyber component. Operating effectively in a new 5G environment will be crucial—not only for countering Violent Extremist Organizations (VEOs) but also for competing with Russia and China. Preparing the environment also supports USSOCOM’s CWMD mission through partner capacity building or direct action.²⁵

Counter Threat Finance. The U.S. can leverage sanctions and trade policy. The efficacy of sanctions during the Ukraine crisis to limit Russian aggression is a useful test case that may galvanize greater global cooperation. As the lead DoD component for synchronizing CTF activities, USSOCOM is well-positioned to bring these capabilities to bear.²⁶ USSOCOM leadership has noted the usefulness of leveraging U.S. CTF capabilities not only as a non-kinetic, finish-agnostic counterterrorism win but also in strategic competition with Russia and China.²⁷ For enforcing sanctions, SOF has a longstanding role in high-risk Visit, Board, Search, and Seizure (VBSS) operations.

Emerging Technology. USSOCOM proactively identifies and counters technical challenges in the future operating environment.²⁸ With a record of success in rapidly fielding technology solutions, USSOCOM is well-equipped.²⁹ It has prioritized³⁰ developing communications technology for austere environments³¹ and new approaches for operating successfully under adversary radars.³² Additional challenges include developing options to defeat biometric systems integrated with adversary technology, including Smart Cities. Broader security vulnerabilities associated with the global expansion of 5G technology also pose concerns. To fully adapt and succeed in a new era of strategic competition, both the DoD and USSOCOM must compete with Russia and China across technical domains identified in the 2018 and 2022 NDS.

Key Topics in a New Era

Fortunately, the U.S. can improve prospects for success. At the very least, policymakers can (1) focus on discerning strategic value, (2) set U.S. policy on gray zone competition and develop expertise, and (3) leverage strategic reviews and net assessments.

Strategic Value

Regions and Assets. Prioritizing key geographic regions and assets according to their intrinsic strategic value will position SOF to outcompete China and Russia when and where it is needed most—whether for maintaining a robust posture in the gray zone, successfully deterring the outbreak of armed conflict, supporting U.S. allies, or preparing for future conflict with China and Russia. For strategists, this represents an opportunity to truly understand where and over which gray zone strategic assets it is most important to “fight and win.”

Data and Dashboards in Strategic Context. Better interpreting and contextualizing data and dashboards on strategic competition is vitally important. Doing so requires an understanding of U.S. national interests, grand strategy, and foreign and defense policy priorities at regional and country levels—as well as the hierarchical concepts of strategic value just noted. Experts well-versed in these concepts can be found across the interagency, including in the Offices of the Secretary of Defense, the National Security Council, the Department of State, and U.S. embassies overseas. Their joint expertise is rarely leveraged systematically to interpret changing levels of political, economic, and military power in the gray zone as China and Russia expand their global influence. In written form, the NDS, various regional strategies and campaign plans, and embassies’ mission strategic plans provide invaluable guidance. The more strategists at all levels of government can develop a common framework to place data in a strategic context, the better. This approach synchronizes understanding across the interagency, enabling strategists to quickly identify and respond to new trends that pose serious concerns.

Gray Zone

Set Policy on Strategic Competition in the Gray Zone. USSOCOM would be wise to further define acceptable competition in the gray zone, particularly regarding economic influence, natural resources, rare earth reserves, and control of global supply chains.³³ Clarifying the extent of U.S. government activities in this realm, including SOF’s role,

would be highly advantageous. Beyond that, specifying when SOF should or should not take specific actions to support U.S. interests would provide valuable guidance. A clear vision for top priorities and specific conditions—including adversary advances or economic exploitation—that merit the use of SOF would greatly benefit leadership, strategists, and operators.

Develop Expertise on Strategic Competition and Escalation in the Gray Zone.

Better understanding the gray zone is already a priority for USSOCOM and the Joint Special Operations University (JSOU); many scholars are also writing on these topics. USSOCOM must improve its understanding of escalation potential at the limits of the gray zone. Additionally, it should prioritize better evaluation, influence, and assessment of victory in ongoing competition below the threshold of war—a challenging task with no clear start or end date for analytic assessments. The emphasis on the gray zone has arisen in response to China’s surprising success in accumulating influence through long-term efforts involving private citizens, overseas diplomats, and economic interests abroad.

Strategic Reviews and Net Assessments

Return on Investment. Success requires analysis of resource allocation and return on investment. This is not pure strategy but rather strategy translated into resource allocation. Solving or optimizing the resource challenge would greatly enhance the likelihood of success, given the massive resources required to counter both Russia and China on a global scale over several decades.

Success of the Strategy. Taking a hard look at the strategy’s level of success is essential. To foster this, leaders must remove organizational obstacles to sound analytic assessments and provide appropriate settings for innovation—approaches SOF has already established. Even so, evaluations that pose new questions about strategic impact can add significant value.

Evaluating Strategy

When evaluating strategy, the key is to have a broad set of questions that can show how well the strategy is achieving the desired ends—and to course-correct as needed.

Key Questions. Policymakers will benefit from developing a robust and varied set of questions that give strategists and practitioners the latitude³⁴ to directly address uncertainty—taking into account important considerations about which no data is available, but which nonetheless regularly factor into leadership decisions.³⁵

One starting point would be to consider whether the strategy advanced DoD’s effort to achieve NDS-level objectives for strategic competition. These objectives are shown in Table 3 (*Did the Strategy Achieve its Ends?*). Similarly, strategists might evaluate the extent to which SOF advanced specific lines of effort called for in the *Special Operations Forces Vision and Strategy* while limiting the risks identified for USSOCOM to avoid. These considerations are detailed in Table 4 (*SOF Vision and Strategy: Evaluation*) and Table 5 (*SOF Vision and Strategy: Risks*).

Hierarchy of Objectives. Establishing a hierarchy of strategic objectives will be crucial. USSOCOM should identify the highest-priority “wins” across each combatant command—“no-fail” missions that deliver strategic impact, without which U.S. national security at the regional level would suffer critical setbacks. These can be differentiated from objectives of lesser importance. In the gray zone, this means understanding the value of maintaining the strategic advantage across different dimensions of national power—not only identifying the highest priorities but also comparing the relative efficacy of wielding each.

Demarcating the Arena for Strategic Competition. USSOCOM will benefit from delineating the key challenges of contesting adversaries (1) in the gray zone, (2) after the outbreak of armed conflict, and (3) after the escalation to large-scale conventional war or nuclear conflict. These zones are shown in Table 2 (*Arena for Strategic Competition*). Strategists should specify SOF’s role in each zone, quickly identify NDS and USSOCOM strategic objectives, and allocate resources to apply as a means to these ends.

Regional Analysis. Taking the additional step of integrating frameworks and objectives of subsidiary U.S. government (USG) strategies and plans at the regional and country levels will add value. This is a useful approach to synchronize the wide range of USG and partner nation priorities, a crucial first step for effective cooperation.

Arena for Strategic Competition	Purpose
Gray Zone	Deny adversary victory in the gray zone
After the Outbreak of Armed Conflict	Deny adversary victory after the outbreak of armed conflict
Further escalation to large-scale conventional war or nuclear conflict	Deny adversary victory through further escalation to a large-scale conventional war or a conflict involving nuclear arms

Table 2: Arena for Strategic Competition

To Conclude: Achieving Success in a New Era

To succeed in a new era of strategic competition, USSOCOM must establish the ends its strategy strives to accomplish, characterize the strategic setting, and select the means to achieve desired ends. USSOCOM must articulate the strategic value of U.S. access, placement, and influence across geographic regions based on broader U.S. national security priorities outlined in the NDS. Discerning the strategic value different policy options offer for U.S. national security will be invaluable.

For example, as USSOCOM seeks to gain the strategic advantage, events will unfold that advance U.S. interests to varying degrees and through different forms of national power. These could include gaining access to ports vital to global trade, investing in global markets important to U.S. national security, strengthening diplomatic ties with key partners, or maintaining a productive role in a regional security organization that supports partner nations and advances U.S. interests. Developing a keen ability to compare strategic value across forms of national power will be especially advantageous.

Even more importantly, USSOCOM must embark on a new effort to place data and dashboards in strategic context in a way that enables strategists and commanders to weigh all critical considerations and make sound decisions that shape the operating environment to their advantage. This involves recognizing that data will not exist for many factors leaders must consider when making vitally important decisions in the gray zone and on the battlefield. Finally, USSOCOM must prioritize conducting strategic reviews and net assessments that take a hard look at whether a strategy has achieved its ends.

Evaluating Strategy

Topics for Strategic Review	Description
Vision: U.S. Advances National Interests	The U.S. secures vital national interests and maintains the American way of life, including democratic governance and a free civil society. It advances national interests and goals as described in the 2018 and 2022 NDS. This includes a commitment to allies and partners, countering rival great powers in critical realms, and maintaining strategic advantage over adversaries, including indirect conflict with Russia and China.
Maintain the Strategic Advantage	The U.S. sustains its strategic advantage globally by successfully contesting adversary power projection and securing strategic assets in theater—preserving the ability to prevail in future eras when and where it is most needed. The U.S. counters rival great powers, limiting Chinese and Russian efforts to project military, political, and economic power globally at the expense of U.S. interests and regional security. It prevents adversaries from gaining access to military bases, ports, strategic trade routes, or other assets of strategic value. Additionally, the U.S. maintains its technical edge over adversaries and effectively counters their exploitation of emerging technology.
Deter the Outbreak of Armed Conflict	The U.S. deters the outbreak of armed conflict, recognizing that doing so protects U.S. allies and vital interests abroad. More importantly, it acknowledges that the outbreak of war among great powers and escalation poses an unacceptable risk.
Offer Support to Partner Nations that Deters Russian or Chinese Aggression	The U.S. demonstrates its commitment to protecting allies and international partners, leveraging its military strength to dissuade adversaries from aggression. As a result, China and Russia are deterred from resorting to conventional or nuclear conflict beyond the gray zone.
Successfully establish integrated deterrence to limit escalation to conventional war or nuclear conflict	U.S. integrated deterrence succeeds in precluding the emergence of large-scale conventional war or nuclear conflict. It limits the development of a nuclear arms race or technologies that could radically alter the nuclear balance and incentivize adversaries to consider the use of nuclear weapons.
Maintain the technical edge, preserving America's ability to fight and win	The U.S. competes with Russia and China in research, development, testing, and evaluation (RDT&E), authoritatively maintaining the technical edge. This ensures the U.S. military can prevail in an armed conflict or other forms of conflict, such as cyber warfare. ³⁶

Table 3: Did the Strategy Achieve its Ends?

To what extent did ...
SOF support priority missions in critical locations as part of integrated deterrence?
SOF reduce strategic risk?
SOF facilitate integration with conventional forces during high-end conflict?
Changes to concepts, capabilities, and doctrine add unique value to integrated deterrence?
A talented workforce enable SOF to innovate, compete, and win?
Newly improved readiness better enable SOF to execute critical missions (e.g., crisis response missions, priority CT missions, CWMD missions)?
SOF use Information Warfare capabilities in deterrence campaigns?
SOF support the Joint Force in high-end conflict?
New or stronger partnerships increase global understanding, bolster deterrence, and create opportunities for shared successes?

Table 4: SOF Vision and Strategy: Evaluation

To what extent did SOF avoid ...?
Loss of access, placement, or influence in critical areas of operation or with key partners or organizations?
Budgetary shortfalls that directly affect the development or advancement of critical capabilities?
Degradation of agreements and relationships with critical partners that impact shared strategic awareness and operational effectiveness?
Insufficient investment in force development and design, failing to yield necessary SOF capabilities?
Authority shortfalls or gaps limiting SOF's ability to support national security interests?
Force structure or posture that is insufficient or misaligned with achieving SOF's strategic aims?
Loss of trust in SOF by decision-makers and the American people to manage resources, prepare the environment, or execute priority missions ethically in politically sensitive environments?

Table 5: SOF Vision and Strategy: Risks

Annex

5G in the Future Operating Environment

Cellular 5G networks provide greater access to data and faster browsing, but they also pose security concerns in the future operating environment.³⁷ This occurs partly because more data resides closer to the user. As China and Russia expand into new geographic regions, they gain increasing access to data transmitted on local 5G networks. The establishment of 5G networks also means a greater number of users across broader geographic areas have access to the digital domain, creating new markets. Chinese giants like Huawei have capitalized on these opportunities, increasing their global market share, power, and influence. China's global infrastructure development campaign extends to its *Digital Silk Road Initiative*, a recent effort to expand Chinese influence alongside enhanced network connectivity and digital infrastructure.

While not specific to 5G, it is important to note that both SOF and adversaries like Russia and China are equipped to compete in the cyber realm. Russian hacking and cyber operations are expansive and remain a major concern for NATO countries like Estonia, which suffered a significant network outage due to Russian hacktivists. Currently, the full extent of how adversaries exploit—or might exploit—security vulnerabilities in 5G networks is unknown. However, such activities could shape or limit how the U.S. operates in the digital domain. Understanding the implications of 5G and the *Digital Silk Road Initiative* remains advantageous for SOF.

Safe Cities

With the expansion of the digital domain, 21st-century cities increasingly turn to technology solutions to organize and secure their municipalities. Chinese tech giant Huawei is a leading provider of Safe City technology. In these cities, police and first responders are connected in real-time, improving responses to emergencies, natural disasters, and crime.³⁸ Safe Cities increasingly incorporate a digital identity dimension, enabled by widespread cameras and biometric technology that screen and track citizens.³⁹

While reductions in crime are welcome, these innovations can be a double-edged sword. Experts in Western countries continue to voice concerns about privacy and civil liberties, as well as the growing power of municipal authorities and the nation-state. Biometric technology and next-generation tracking enable ubiquitous technical surveillance (UTS), allowing states to precisely identify citizens as they move throughout the city.⁴⁰

This persuasive surveillance of urban environments presents an important challenge for SOF, which must operate in these spaces in the coming decades. Chinese tech giants like Huawei actively market Safe City technology to regions where they are developing greater diplomatic, military, and economic footholds. As a result, SOF will face increased difficulty operating clandestinely in urban environments—whether establishing a presence, preparing the environment, or conducting kinetic operations.

Denied Environments

Fully understanding the future operating environment involves understanding the technical challenges of operating in denied environments. As Russia and China seek to exert greater influence in new regions, their military presence can create increasingly denied environments. Therefore, the U.S. would be wise to identify strategic regions and modes of action to preserve—well in advance of Chinese or Russian encroachment.

There are several notable technical features of an adversary-controlled environment. In general, this is likely to mean a future operating environment where the U.S. and its allies must contend with challenges including.

- Radar jamming technology
- GPS-denied environments
- Integrated Air Defense Systems (IADS)
- Anti-access/area denial (A2/AD) systems

Developing a robust understanding of the resultant operational constraints, in consultation with technical experts, would be highly advantageous.⁴¹

The Information Environment

Adversaries also shape the future operating environment by controlling or influencing the information environment. This ranges from formal information operations—where non-democracies like China and Russia hold an advantage—to less formal cultural campaigns or public affairs initiatives. Adversaries may also have the power to curtail the information space, depending on the extent of their control; for example, they may limit access to the open internet or encroach on freedom of the press. Within the broader information environment, adversary MISO are a topic of considerable interest to U.S. strategists. In general, it will be crucial to understand the overall strategy of adversaries' MISO efforts and their practical application by region or country. The cyber domain, also linked to the broader information environment, may also be contested. In a new era of strategic competition, MISO—especially in the digital realm—has unique reach for targeting adversaries and their proxies anywhere around the globe, often at relatively low cost.

Endnotes

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⁴ Jeffrey Becker and John DeFoor, “Exploring the Future Operating Environment,” *JFQ* 89, 2nd Quarter 2018; Future Operational Environment: Forging the Future in an Uncertain World, 2035-2050, U.S. Army Futures Command, AFC PAM 525-2.

⁵ “Fact Sheet: 2022 National Defense Strategy,” Department of Defense, 28 March 2022.

⁶ Joint Concept for Integrated Campaigning, 16 March 2018; Kimberly Amerson and Spencer B Meredith III, “The Future Operating Environment 2050: Chaos, Complexity, and Competition,” *Small Wars Journal*, 31 July 2016; Jim Thomas and Christopher Dougherty, *Beyond the Ramparts: The Future of US Special Operations Forces* (Washington DC: Center for Strategic and Budgetary Assessments, 2013).

⁷ This is a massive and long-term effort designed to ensure that the US can deter future wars—or win if conflict cannot be averted.

⁸ This table reflects goals outlined in the NDS, in USSOCOM Congressional Testimony and official documents such as the Special Operations Forces Vision and Strategy, which is available at: <https://www.socom.mil/sof-vision-and-strategy>.

⁹ USSOCOM leadership has remarked on the increasing prevalence of denied environments. For example, General (Ret.) Clarke recently made a comparison between (1) the recent U.S. raid in Syria targeting a leader of ISIS, and (2) the raid on UBL in Pakistan several years earlier. General (Ret.) Clarke remarked that the mission in Syria proved far more challenging, simply because navigating Russian-controlled Syrian air space introduced new challenges above and beyond what SOF had faced for Neptune Spear, the raid on UBL in Pakistan. Furthermore, in Syria, the greatest challenge was not the direct action portion of the mission, but rather navigating Syrian airspace without detection.

¹⁰ Joint Concept for Integrated Campaigning, Joint Chiefs of Staff, U.S. Department of Defense, 16 March 2018.

¹¹ Tom Searle, *Outside the Box: A New General Theory of Special Operations* (Tampa: JSOU Press, 2017), JSOU Report 17-4; Joe Osborne, “Advancing a Strategic Theory of Special Operations,” *Small Wars Journal*, 16 May 2016; Richard Rubright, A Unified Theory for Special Operations (Tampa: JSOU Press, 2017), JSOU Report 17-1; Peter McCabe and Paul Lieber, eds, *Special Operations Theory* (Tampa: JSOU Press, 2017), Vol. 3 of 3, JSOU Report 17-6; Eric Olson, “USSOCOM and SOF: Ward Around The Edges,” *Journal of National Security Law & Policy*, Vol. 12:71 (71-80), 2021.

¹² The Joint Operating Environment 2035: The Joint Force in a Contested and Disordered World, Joint Chiefs of Staff, US Department of Defense, 14 July 2016.

¹³ Stew Magnuson, “SOFIC NEWS: Special Operations Command Turns Attention to Indo-Pacific,” National Defense, 15 May 2022.

¹⁴ Jim Thomas and Christopher Dougherty, *Beyond the Ramparts: The Future of US Special Operations Forces* (Washington DC: Center for Strategic and Budgetary Assessments, 2013).

¹⁵ Security Force Assistance (SFA) and Foreign Internal Defense (FID) initiatives include a wide variety of military exercises, training and capacity building partnerships, including well established programs like Joint Combined Exchange Trainings (JCETs).

¹⁶ Troy White, *Growing SOLO: Expanding the Spectrum of SOF Advisory Capabilities* (Tampa: JSOU Press, 2018); Stephen Biddle, “Does Building Partner Military Capacity Work?” Irregular Warfare Podcast, 19 June 2020.

¹⁷ John Deni, “Making Security Cooperation Part of the Army’s ‘Win’ Set,” *Small Wars Journal*, 7 September 2012; James Micciche, “Competing through Deception: Expanding the Utility of Security Cooperation for Great Power Competition,” *Small Wars Journal*, 25 June 2021; Joe Gould, “Pentagon Chief Stresses Security Cooperation as Key to Stopping Russia’s Black Sea Aggression,” *Defense News*, 26 October 2021; Stephen Biddle, “Does Building Partner Military Capacity Work?” Irregular Warfare Podcast, 19 June 2020; “When Security Force Assistance Works—and When it Doesn’t,” Modern War Institute Podcast, 16 December 2021; “The Practice and Politics of Security Force Assistance,” Irregular Warfare Podcast, 23 January 2021.

¹⁸ U.S. Congress, House, Subcommittee on Intelligence and Special Operations, FY23 Hearing to Review Department of Defense Strategy, Policy, and Programs for Countering Weapons of Mass Destruction, 2021; Jonathan Hillman, *The Digital Silk Road: China’s Quest to Wire the World and Win the Future* (New York: Harper Collins, 2021).

¹⁹ Lonnie Carlson and Margaret Kosal, “Preventing Weapons of Mass Destruction Proliferation—Leveraging Special Operations Forces to Shape the Environment,” (Tampa: JSOU Press, 2017); Loveday Morris, Ievgeniia Sivorka, and John Hudson, “Inside Ukraine’s Captured Nuclear Plant, Explosions and Constant Fear,” *Washington Post*, 15 August 2022; “Ukraine’s President Condemns ‘Russia’s Nuclear Terrorism’ in Call with Macron,” *Reuters*, 16 August 2022; Guy McCardle, “Russians Strike Ukrainian Nuclear Power Plant,” *SOFREP*, 13 August 2022; Bea Karnes, “UC Berkeley Engineers Send Equipment, Expertise to Ransacked Chernobyl,” *Patch*, 10 August 2022; “Russia Demands Ukraine Surrender Azot Chemical Plant and Severodonetsk,” *SOFREP*, 16 June 2022; Andrew Carey, Kostan Nechyporenko and Jack Guy, “Russia Destroys Chernobyl Radiation Monitoring Lab, Says Ukraine,” *CNN*, 23 March 2022; “Ukraine War: Chernobyl Power Supply Cut Off, Says Energy Operator,” *BBC News*, 9 March 2022; Zachary Evans, “Russian Forces Capture Chernobyl Nuclear Plant, Airport Outside Kyiv,” *National Review*, 24 February 2022.

²⁰ Travis Clemens, *Special Operations Forces Civil Affairs in Great Power Competition* (Tampa: JSOU Press, 2020), JSOU Report 20-4.

²¹ MISO can also shape the view of mission critical target audiences in a variety of settings—primarily at the tactical level. A primary objective is simply to identify, at the regional level, how near peers are shaping the information environment via MISO. Fully leveraging expert knowledge of the ‘Digital Silk Road’ for example, ought to be a primary line of effort. As resources are available, the U.S. should seek to counter adversary MISO that could have strategic effects throughout the region, or decisively define the future operating environment in ways disadvantageous to the United States.

²² Thomas Rid, *Active Measures: The Secret History of Disinformation and Political Warfare* (New York: Farrar, Straus and Giroux, 2020); “Information Operations for the Information Age: IO in Irregular Warfare,” Irregular Warfare Podcast, 24 September 2021.

²³ In the regions, the first step toward countering near peer adversaries seeking to bring about a fait accompli in the gray zone is to take note of Chinese and Russian attempts to shape the information environment, that is, all adversary MISO. The information environment can be a crucial battleground—because dominating it enables an adversary to shape the perceptions of regional states and can induce them to bandwagon with regional hegemony if they believe that their US ally cannot deter aggression or wavers in resolve. Understanding the aim and effectiveness of adversary MISO is crucial; if adversary MISO has the potential for strategic impact, SOF may need to consider developing US MISO initiatives designed to discredit it.

Even so, the US as a democracy generally lacks the acumen of its adversaries in conducting information operations—MISO being one way that the US can exert a presence in the information

space. Fortunately for the US, sharing accurate openly available information with populations around the globe often adds considerable value—especially when Russian and Chinese adversaries seek to obscure the truth.

²⁴ “Back to the Future: SOF in an Era of Great Power Competition,” Irregular Warfare Podcast, 2 July 2021.

²⁵ General Richard Clarke, “The Future of Special Operations Forces,” moderated by Michèle Flournoy, Aspen Security Forum, 4 November 2021.

²⁶ “New USSOCOM J35 Counter Threat Finance (CTF) Curriculum,” *Joint Knowledge Online*, 4 August 2022.

²⁷ Lonnie Carlson and Margaret Kosal, *Preventing Weapons of Mass Destruction Proliferation—Leveraging Special Operations Forces to Shape the Environment* (Tampa: JSOU Press, 2017); “Back to the Future: SOF in an Era of Great Power Competition,” Irregular Warfare Podcast, 2 July 2021.

²⁸ “USSOCOM Commander GEN Richard D. Clarke,” SOFCAST, 23 February 2022.

²⁹ The Modernization Quandary: Emerging Technologies Institute Report, Emerging Technologies Institute, 26 July 2021.

³⁰ General Richard Clarke, “The Future of Special Operations Forces,” moderated by Michèle Flournoy, Aspen Security Forum, 4 November 2021.

³¹ SOFWERX is a platform designed to help solve challenging Warfighter problems at scale through collaboration, ideation, events, and rapid prototyping. Additional information available at: <https://www.sofwerx.org/>.

³² Stew Magnuson, “SOFIC NEWS: Special Ops Tech Priorities Include Protected Comms, Counter-UAS,” *National Defense*, 17 May 2022.

³³ United States–China Economic and Security Review Commission Hearing on “US–China Competition in Global Supply Chains,” 9 June 2022.

³⁴ Joint Doctrine Note. 1-15: Operation Assessment, US Department of Defense, 15 January 2015.

³⁵ The Joint Doctrine Note 1-15 is focused on Operation Assessment rather than strategy but has many useful and transferrable concepts, to include considerations at the strategic level, specific questions for assessment, and the use of data to shape leadership’s understanding of the operational environment and guide decision-making.

³⁶ This is a massive and long-term effort designed to ensure that the US can deter future wars—or win if conflict cannot be averted.

³⁷ Graham Allison, Kevin Klyman, Karina Barbesino, and Hugo Yen, “The Great Tech Rivalry: China vs. the US,” Belfer Center for Science and International Affairs, Harvard Kennedy School, December 2021; The 5G Ecosystem: Risks & Opportunities for DoD, Defense Innovation Board, April 2019.

³⁸ Huawei, “Safe Cities: Using Smart Tech for Public Security,” BBC, accessed March 2015.

³⁹ Anthony M. Townsend, *Smart Cities: Big Data, Civic Hackers and the Quest for a New Utopia* (New York: W.W. Norton & Company, 2013).

⁴⁰ Former Deputy CIA Director for Science and Technology Dawn Meyerriecks on “Intelligence Matters,” *CBS News*, 26 January 2022.

⁴¹ Chris Dougherty, “Moving Beyond A2/AD,” *CNAS*, 3 December 2020.