

9/11 AND CANADIAN SPECIAL OPERATIONS  
FORCES: HOW '40 SELECTED MEN'  
INDELIBLY INFLUENCED THE  
FUTURE OF THE FORCE

A Monograph

by

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## ABSTRACT

9/11 AND CANADIAN SPECIAL OPERATIONS FORCES: HOW '40 SELECTED MEN' INDELIBLY INFLUENCED THE FUTURE OF THE FORCE, by Lieutenant Colonel Stephen J. Day, 83 pages.

In less than two decades, Canadian Special Operations Forces (CANSOF) grew from a 100-man hostage-rescue unit to a 2,500-person Command capable of prosecuting missions across the special operations spectrum. The seminal event causing this transformation is examined within this monograph.

The common narrative explaining the rise of Canadian Special Operations Forces Command (CANSOFCOM) states that 9/11 is the seminal event. Herein, a new narrative is proposed. One that posits the 2001-02 deployment of a 40-man CANSOF Task Force to Operation Enduring Freedom (OEF) is the seminal event. This Task Force's disproportionately positive impact on the Canadian national scene caused key national actors to take note of the strategic utility of special operations forces.

Twenty-four interviews with defence and security subject matter experts from the political, federal public service, military and academic domains, as well as two leading Canadian national journalists provide unique insights into CANSOF's ascendancy. Analyzing published defence policy since World War II and Canada's 20-year experience with her national counter-terrorism task force prove two key points. First, defence policy is extant, consistently expressing the requirement for an irregular capability for the conduct of operations in asymmetrical environments. Therefore, 9/11 did not change Government of Canada (GoC) expectations per se. Second, the one-year CANSOF OEF commitment produces a highly positive national strategic effect for the GoC. As a result, in less than a decade CANSOF transitions from a single, domestically focused, national counter-terrorism task force to where today CANSOFCOM is employed as a distinct element of national military power. This transformation from a single strategic resource to a strategically relevant, 'hard power' option currently provides the GoC with greater strategic choice when she looks to deploy military forces alongside her allies.

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## ACRONYMS

ADM (Pol)	Assistant Deputy Minister–Policy (responsible for defence policy)
AUSCANUKUS	Australia, Canada, United Kingdom, United States (the four-eyes community or 4-Eyes)
C2	Command and Control
C4ISR	Command, Control, Communications, Computers, Intelligence, Surveillance and Reconnaissance
CANSOF	Canadian Special Operations Forces
CANSOFCOM	Canadian Special Operations Forces Command
CDS	Chief of the Defence Staff
CAF	Canadian Armed Forces (official name for Canada’s Armed Services)
CF	Canadian Forces (the colloquial name, in use since the 1970s)
CWO	Chief Warrant Officer
CJSOTF	Combined Joint Special Operations Task Force
DCDS	Deputy Chief of the Defence Staff (the former Second-ranking Officer)
DFAIT	Department of Foreign Affairs and International Trade
DM	Deputy Minister (the Senior Public Servant in a federal department)
DND	Department of National Defence
GoC	Government of Canada
HR	Hostage Rescue (task or mission-set)
HRO	Hostage Rescue Operation
JTF 2	Joint Task Force Two (Canada’s national Counter-Terrorism Unit)
LCol	Lieutenant Colonel
LGen	Lieutenant General
MGen	Major General
MND	Minister of National Defence
MWO	Master Warrant Officer

NSP	National Security Policy
OEF	US Operation ENDURING FREEDOM
Ops O	Operations Officer
PSC	Public Safety Canada (equivalent to Department of Homeland Security)
PM	Prime Minister
RCMP	Royal Canadian Mounted Police (Federal Police Force)
RCAF	Royal Canadian Air Force
RCN	Royal Canadian Navy
Retd	Retired
SCONDVA	Standing Committee on National Defence and Veterans Affairs (Parliamentary Committee)
SERT	Special Emergency Response Team (former RCMP national Counter-Terrorism Unit)
SOF	Special Operations Forces
TTP	Tactics, Techniques and Procedures
VAdm	Vice Admiral

## PROLOGUE

Remember, when the time of crisis comes, 40 selected men can shake the world.<sup>1</sup>  
—Yasotay in Gray, “Handfuls of Heroes on Desperate Ventures: When do Special Operations Succeed?”

The silence was broken as the troop commander keyed his sabre radio. “29er this is 21, phase line green.” “21 this is 29er. Acknowledge phase line green, WAIT . . . 21, You have control, OUT!” The captain and his warrant officer exchanged a confirmatory glance. “21 ack, . . . All call-signs I have control . . . stand-by . . . stand-by . . . GO! GO! GO!” Simultaneous explosive breaches rocked the darkened target; relative superiority was achieved immediately through a combination of surprise and target saturation; a cacophony of diversionary devices and short, laser designated surgical bursts indicated the battle was joined.<sup>2</sup> Assessments of risk to mission, men or self were made within milliseconds of encountering an ‘unknown’; life or death thus determined, the assaulters flowed through the target. “29, this is 21. Objective secure, SITREP to follow.” The Capture-Kill mission was a success; the high-value target was taken alive.

The lights came up on the close-quarter battle range. Canada’s Deputy Prime Minister (PM) and the Minister of National Defence (MND) took several moments to reflect upon and discuss what they had just witnessed. Turning to the unit’s Commanding Officer the Deputy PM asked, “Clyde, are these men ready for combat?” Without hesitation Lieutenant Colonel Clyde Russell looked first at the MND, before answering the Deputy PM directly, “Sir, this unit exists so that Canada has an immediate response to terrorism, we are always ready. I have no doubt these 40 men will do us proud.”<sup>3</sup>

With that simple exchange, the political support is solidified to deploy ground forces into combat for the first time since the Korean War. Nobody knows what the future holds. The only certainty insofar as Joint Task Force Two (JTF 2) is concerned is one of a new perspective on JTF 2’s strategic utility. However, how that affects JTF 2’s future remains unclear. The immediate national effect is to unequivocally demonstrate solidarity with Canada’s neighbour and key ally.

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<sup>1</sup>Yasotay, quoted in Colin S. Gray, “Handfuls of Heroes on Desperate Ventures: When do Special Operations Succeed?” *Parameters* XXIX (Spring 1999): 2-24, <http://www.carlisle.army.mil/usawc/parameters/Articles/99spring/gray.htm> (accessed 11 April 2013).

<sup>2</sup>The phenomenon of relative superiority exists when an assaulting force (often smaller) is able to seize the initiative and accomplish its mission despite the presence of an opposing (often larger) force. For more see, William H. McRaven, *Spec Ops – Case Studies in Special Operations Warfare: Theory and Practice* (Toronto, ON: Random House of Canada Limited, 1996), 4-8.

<sup>3</sup>The vignette is based upon recollections provided by the former Commanding Officer Col (retd) Clyde Russell and corroborated by CWO (retd) Mike Anderson.

## INTRODUCTION

There are very few times in the history of any country when all persons must take a stand on critical issues. This is one of those times; this is one of those issues. I am confident that those persons who unleashed this tragic sequence of events with the aim of destroying our society and dividing our country will find that the opposite will occur. The result of their acts will be a stronger society in a unified country. Those who would have divided us will have united us.<sup>4</sup>

—Canadian Prime Minister Pierre Elliot Trudeau,  
“Response to the October Crisis of 1970”

Today Canada is a vibrant, leading, middle power. Her highly favourable geopolitical circumstances are truly a blessing. Geographically isolated within the northern portion of the western hemisphere, she has only one terrestrial neighbour. Canada possesses an uncommon diversity and largesse of natural resources and is populated by an industrious and socially conscious people. This fortuitous array of conditions, coupled with Canadian idealism and always ‘assuming the best of others’, allows Canada to harbour no offensive or imperial ambitions as “Such a possibility would be unthinkable and unacceptable.”<sup>5</sup> She simply seeks ‘peace, order and good governance’ in all her affairs so that her citizenry can continue a life of prosperity.

However, as the epigraph above reminds all Canadians, Canadian history is rife with tales which largely disprove two enduring Canadian myths. First, that Canada is a “fire-proof house far from inflammable materials.”<sup>6</sup> Second, that she is the “peaceable kingdom” and free from internal security challenges.<sup>7</sup>

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<sup>4</sup>The Right Honourable Pierre Trudeau, P.C., “Response to the October Crisis of 1970,” Notes from a National broadcast 16 October 1970, Privy Council Office, <http://www.collectionscanada.gc.ca/primeministers/h4-4065-e.html> (accessed 21 December 2012).

<sup>5</sup>Canada, *Defence in the 70's: White Paper on Defence* (Ottawa, ON: Department of National Defence, 1971), <http://www.forces.gc.ca/admpol/downloads/Defence%20in%20the%2070s.pdf> (accessed 21 December 2012), 7.

<sup>6</sup>Canada, “1921-1939: Between Two Wars,” *Canada and the World: A History of Canadian Foreign Policy*, History of Canada’s Department of Foreign Affairs & International Trade, <http://www.international.gc.ca/departement/history-histoire/dcer/browse-en.asp> (accessed

Canadian military history is rich. Ever since the Canadian Federation's birth in 1867 she stands by her allies, "Canada has never been neutral."<sup>8</sup> The Easter Monday, 1917 Canadian Corps' capture of Vimy Ridge is but one example of the great victories won by Canada's regular military services. Paradoxically vicious and costly battles are the national proving ground. All which lend credence to the notion that although Canada is not a warrior nation coercing others by threat of force; she is certainly a nation of warriors. A nation who stands with her allies in times of crisis; who when called to the just fight, can fight with the best against the best.

Generally speaking, the history and exploits of Canada's regular forces are what Canadians understand, learn, and publicly celebrate.<sup>9</sup> What is less known is that Canadians are also equally at ease and proficient employing irregular means and methods of warfare.<sup>10</sup> *Les*

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27 November 2012). Canadian Senator Rauol Dandurand's famous 1924 evocation at the fifth assembly of the League of Nations on the seemingly never ending security challenges within Europe in contrast with 'the North American century of peace' between Canada and US.

<sup>7</sup>Ron Crelinsten, "Canada's Historical Experience with Terrorism and Violent Extremism," in Gartenstein-Ross, Daveed and Senator Linda Frum, eds., *Terror in the Peaceable Kingdom: Understanding and Addressing Violent Extremism in Canada*. (Washington, D.C.: Foundation for Defense of Democracies Press, 2012), [http://www.defenddemocracy.org/stuff/uploads/documents/Peaceable\\_Kingdom.pdf](http://www.defenddemocracy.org/stuff/uploads/documents/Peaceable_Kingdom.pdf) (accessed 21 January 2013), 9.

<sup>8</sup>During the 20th Century in particular, Canada was one of the first nations to respond to the call of friends and allies. In both relative and real terms Canada was one of the largest and key contributors to allied efforts during both World Wars, the Korean Conflict and most recently in Libya and Afghanistan. For many years she was also a leading contributor to UN peacekeeping operations. Canada, *Challenge and Commitment: A Defence Policy for Canada* (Ottawa, ON: Department of National Defence, 1987), <http://www.forces.gc.ca/admpol/downloads/Challenge%20and%20Commitment%201987.pdf> (accessed 27 November 2012), 3.

<sup>9</sup>All personal interviews conducted in support of this monograph are authorized for full attribution and disclosure by the interviewees. See the Appendix for an example of the informed consent form. Ms. Mercedes Stephenson, telephone interview with author, 20 January 2013 and Ms. Adele Ferguson, telephone interview with author, 16 December 2012.

<sup>10</sup>For the clarity to the various audiences this paper will reach (US, Canadian, academic and military professional), it is imperative to provide some doctrinal clarifications upfront. First, throughout this monograph the term regular force(s) is understood to infer general-purpose forces (GPF) and are thus interchangeable. GPF is a reference to the traditional services of army, naval and air forces raised by Canada. GPF are optimized for the conduct of conventional operations or

*Canadiens* repeatedly raise irregular forces throughout her nearly 500-year history. Employing them as raiding, commando, or for other specialized tasks such as confronting various asymmetrical threats (e.g. terrorists), or to execute especially hazardous or difficult operations (e.g. critical infrastructure sabotage). Historically Canadian national leaders also routinely

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traditional warfare (i.e. state versus state) within a symmetrical battle space context. The term irregular force(s) includes raiding, commando or other specialized forces. These forces are specifically selected, uniquely trained, and specially equipped so they are optimized for the conduct of non-conventional operations (i.e. state versus non-state actors) or irregular warfare within an asymmetrical context. In Canada GPF and irregular forces are complimentary with each other, optimized for different missions and tasks. Herein their major differentiator is centred on the idea of what they were optimized for (i.e. right tool for the job based on mission requirements, operational environments and operating constructs). For non-Canadian audiences, the contemporary context and connotations of the term SOF was non-existent prior to 9/11 and did not appear officially in Canadian doctrine until after 2005. This lack of Canadian doctrinal continuity over time and the idea optimization are key concepts in understanding the rationale behind using the term irregular forces to differentiate from regular forces. Second, unlike US joint doctrine, CAF doctrine lacks a formal definition for irregular conflict, irregular war or irregular warfare. Therefore for use henceforth the following is offered. Irregular Warfare (IW): The main feature is an asymmetry in combat power available and accessible to the opposing parties. The key differentiator from conventional or traditional conflict is the lack of formed, distinguishable and clearly identifiable, opposing military forces in the battle space. To successfully resolve irregular conflicts generally requires a joint, interagency, multinational and public (JIMP) approach, as the root causes are usually societal, cultural or ideologically based/driven. Other notable characteristics often include the deliberate targeting of non-combatants (e.g. war among the people) and the lack of adherence to well-established, internationally accepted norms, laws and codes of conduct (e.g. Law of Armed Conflict or the Geneva Conventions) by one or more of the belligerent actors. Typical IW methodologies include: insurgencies and guerilla movements, all forms of violent radicalized extremism (political, religious, ideological based), transnational crime where it supports the first two, and informational warfare. IW may be a precursor, adjunct, or successor campaign within a larger traditional conflict or it may be the strategy of choice on its own. For comparison I offer the official US joint definition: "Traditional war is characterized as a confrontation between nation-states or coalitions/alliances of nation-states. Traditional war typically involves small-scale to large-scale, force-on-force military operations in which adversaries employ a variety of conventional military capabilities against each other in the air, land, maritime, and space physical domains and the information environment (which includes cyberspace). IW has emerged as a major and pervasive form of warfare. Typically in IW, a less powerful adversary seeks to disrupt or negate the military capabilities and advantages of a more powerful, conventionally armed military force, which often represents the nation's established regime." GEN Martin E. Dempsey, USA, Joint Publication 1, *Doctrine for the Armed Forces of United States* (Washington, D.C.: US Government Printing Office, 2009), [http://www.dtic.mil/doctrine/new\\_pubs/jp1.pdf](http://www.dtic.mil/doctrine/new_pubs/jp1.pdf). (accessed 4 January 2013), X. For more thoughts the author suggests His Excellency John Ralston Saul, "A New Era of Irregular Warfare?" *Canadian Military Journal* 5, no. 4 (Winter 2004-2005), <http://www.journal.dnd.ca/vo5/no4/leadership-directio-eng.asp>. (accessed 5 January 2013).

disband these same units shortly after their immediate need passes. Their disbandment often occurs despite their battlefield successes while in pursuit of the common cause.<sup>11</sup> This historical pattern of raising specialized forces after the crisis occurs; only to disband them before the conflict ends is a re-occurring pattern that the present day Canadian Special Operations Forces (CANSOF) leaders would be wise to always bear in mind.

The contemporary CANSOF back story is equally instructive, as it too provides insights. Therefore, measuring against historical precedent, did Canada finally ‘cross the Rubicon’ with the 2006 establishment of a Canadian Special Operations Forces Command (CANSOFCOM)?<sup>12</sup> With the creation of an irregular force outside the traditional regular services, the Canadian Armed Forces (CAF) now possess a “fourth service.”<sup>13</sup> A force that is optimized to deter, prevent, disrupt, or defeat the various asymmetrical hazards and threats arising from the ambiguities and complexities of the contemporary and future security environments.

Why did the attitudes and actions of Canadian national leaders - who have traditionally been wedded to an institutional norm that is predisposed to the status quo and thus loathe to

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<sup>11</sup>The highly effective and famous “Black Devils” brigade, a combined Canadian-US WWII formation known as the First Special Service Force, is but one example. For a more in-depth understanding of Canadian irregular warfare history see: Col Bernd Horn PhD, “The Canadian Special Operations Forces’ Legacy,” in *Special Operations Forces: A National Capability* (Kingston, ON: Canadian Defence Academy Press, 2009), Ch. 1 and Jérôme Lacroix-Leclair and Eric Ouellet, “The Petite Guerre in New France, 1660–1759: An Institutional Analysis,” *Canadian Military Journal* 11, no.4 (2011), <http://www.journal.forces.gc.ca/vo11/no4/48-ouellet-eng.asp> (accessed 6 January 2013).

<sup>12</sup>Throughout this paper, whenever the term CANSOF appears it is used as a generic term to cover the various machinations of the contemporary Canadian SOF capability to include the many task-tailored special operations task forces employed. This is done to recognize the contributions to CANSOF by those who may not have been members of a specific CANSOF unit (e.g. staff officers or attached specialists). However, it must be assumed that JTF 2 figures prominently in almost every instance of its use. Where CANSOFCOM is used, it refers specifically to the formal grouping of the CANSOF capability as a formation since 2006.

<sup>13</sup>Chiefs of the Defence Staff Gen (ret'd) Rick Hillier and his immediate successor Gen (ret'd) Walter Natynczyk often publically referred to CANSOFCOM as the fourth service.

investing in niche military capabilities - change so dramatically?<sup>14</sup> One common opinion holds that 9/11, as the ‘watershed event’ for the global special operations forces (SOF) community writ large is by extension, the seminal event leading to today’s CANSOFCOM. Another opines that CANSOFCOM is the inevitable outcome of the post-9/11 revision to national defence policy.<sup>15</sup> The research contained herein simply does not support either contention. Although it does support the view that 9/11 is the catalyst that finally transforms the Canadian National Security mindset. Therefore is CANSOF an outlier who simply profits from that shift in mindset, or is there another reason explaining CANSOF’s post-9/11 ascendancy?<sup>16</sup> It is postulated that the answer is found by examining fifty years of Canadian Defence Policy in conjunction with studying Canada’s 20-year experience with her national counter-terrorism task force (Joint Task Force Two or JTF 2).

Therefore to start, the first section of this monograph reviews defence policy since WWII.<sup>17</sup> Evidence therein discredits both the policy-driven and 9/11-centric narratives for CANSOF ascendancy by proving two points. First, policy is extant outlining the requirement for

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<sup>14</sup>This issue is examined further in two books: Douglas L. Bland, ed. *Canada's National Defence: Volume 1 Defence Policy* (Kingston, ON: School of Policy Studies, Queen's University, 1997) and LCol Bernd Horn, *Bastard Sons: An Examination of Canada's Airborne Experience 1942-1995* (St. Catherines, ON: Vanwell Publishing Limited, 2001).

<sup>15</sup>An example of this line of thinking, “The Canadian Forces (CF) has changed substantially in the past decade, largely as a result of the terrorist attacks of 9-11 which altered the national security paradigm calling for refinements to Canada’s instruments of national power.” Col Mike Rouleau, “Between Faith and Reality: A Pragmatic Sociological Examination of Canadian Special Operations Forces Command’s Future Prospects,” A Directed Research Paper, Canadian Forces College, Toronto, ON, 2012, 4.

<sup>16</sup>Malcolm Gladwell, *Outliers: The Story of Success* (New York, NY: Hachette Audio a Division of Hachette Book Group, 2008), Ch. 1.

<sup>17</sup>Two comments upfront are essential to better understand Canadian defence policy and its formulation. First and foremost, in the Canadian parliamentary system the issuing of official defence policy is an episodic affair as evidenced by the inconsistent time periods between the various policy incarnations. This is because the release of policy is very much determined by the sitting government, as there is no legislative remit to meet pre-determined timelines. Second, for use herein the generic term defence policy is used throughout. Notwithstanding that the official publications may be titled “White Papers, Strategies, or Policies”.

the CAF to be irregular warfare capable.<sup>18</sup> Second, it finds that 9/11 is simply the tipping point that enables a wider National Security paradigm shift.<sup>19</sup> Hence neither is-and-of-itself the seminal event in terms of CANSOFCOM's ascendancy; but both are necessary pre-conditions that provide an accelerator to an emerging National Security mindset and overall defence and security enterprise renewal. Therefore, another reason must exist for CANSOF's rise.

The second section focuses on CANSOF as a chronological case study. The CANSOF capability is examined over two distinct timeframes (pre and post 9/11). This construct highlights the capability's propensity for growth, as well as it clearly exposes the increasing appreciation by various national actors of the strategic utility of special operations forces (SOF). The analysis of JTF 2's twenty year history proves CANSOF is borne as a strategic resource but over time it morphs into something different. The analysis indicates that from mid-2002 onwards CANSOF's ability to expand is greatly enabled by overt support from various strategic actors who understand the strategic versatility of SOF as a direct result of one experience, and it is not 9/11 per se.

That one experience is the very positive reaction to the military strategic response to the 9/11 attacks on Canada's neighbour and key ally. Where the Government of Canada (GoC) commits to a one-year deployment of a CANSOF Task Force of approximately 40 men from JTF 2. This deployment on Operation Enduring Freedom (OEF) garners a disproportionate and noticeable national strategic effect. One causing Canadian national leaders to appreciate that SOF provides a tangible 'hard power' option; with high strategic payoff and relatively low political and military risk. As a direct result, CANSOF's strategic relevance grows.

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<sup>18</sup>Bland, *Canada's National Defence: Volume 1 Defence Policy*.

<sup>19</sup>Malcolm Gladwell, *The Tipping Point: How Little Things Can Make a Big Difference* (New York, NY: Bay Back Books a Division of Hachette Book Group, 2002), Ch. 1. For an exceptional and holistic appreciation of paradigms, how they are established, updated and ultimately discarded the author recommends the authoritative book by Thomas S. Kuhn, *The Structure of Scientific Revolutions, 3<sup>rd</sup> ed.* (Chicago, IL: The University of Chicago Press, 1996).

Strategically relevant is defined as a military capability that is politically valuable, institutionally legitimate and when adequately resourced (i.e. with people and funding), operationally viable. It consists of two mutually supporting and linked concepts due to the finite resource allotments for national security. The first element is the resourcing requirement which demands cost-effectiveness; the so-called 'bang for your buck'. The second element is the operational requirement whereby military capabilities either expand military strategic options or they do not. If when paired the sum is positive, then the capability becomes strategically relevant.

Therefore, had the OEF deployment been less strategically impactful, it is highly doubtful that the 2006 transformation of the Canadian Forces (CF) includes the creation of a fourth service. Thus, the argument is CANSOF's 2001-2002 OEF commitment is the seminal event cementing CANSOF's strategic relevance in the minds of many national leaders. In turn, this recognition coupled with the institutional legitimization of CANSOF within the Department of National Defence (DND), leads to the capability's accelerated growth and the requirement for a CANSOFCOM. In sum, this strategic relevance begets a new Command, and for the time being the Canadian historical pattern of preferencing regular forces over irregular ones is suspended.

The final section refutes counter-arguments, summarizes the major findings, and provides recommendations and suggestions for areas of further study. The key recommendation of this work strongly encourages CANSOF to vigorously expand its current practice of open engagement with academia, the media, and the wider community of interest. This is to address a lack of diversity, depth and informed debate on CANSOF which ultimately hinders progress. The lack of truly unbiased material and an insufficient quantity of quality research work on CANSOF threatens not only the capability, but does a disservice in explaining its value to the Nation.

## CANADIAN DEFENCE POLICY FROM 1964-2008

Many of the basic principles that govern Canada's defence policy are constant because they are determined by factors, such as geography and history, which are specific . . . principles remain constant.<sup>20</sup>

—Canada, *White Paper on Defence*

This section examines published defence policy since WWII.<sup>21</sup> The research proves the alternative narratives unfounded. It also confirms Douglas Bland's assertion, "What is less obvious is that, although the context changes and the political rhetoric varies, the actual policy that has directed Canadian defence policy is very nearly always the same."<sup>22</sup> The research finds that despite 9/11, and the attendant revision to defence policy, Government of Canada's (GoC) defence policy is extant with regards to the need for an irregular capability or force within the CAF. Regardless of period, policy consistently expresses the same operational requirement for the CAF to be capable of successfully operating in asymmetrical environments (for which irregular forces are optimized).

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<sup>20</sup>Canada, *White Paper on Defence* (Ottawa, ON: Department of National Defence, March 1964), <http://www.forces.gc.ca/admpol/downloads/White%20Paper%20on%20Defence%20-%20March%201964.pdf> (accessed 27 November 2012), 5.

<sup>21</sup>It is important to note that the policies prior to 1964 (most notably the 1947 Defence Policy) are not analyzed or discussed for two main reasons. The 1947 document is focused on the monumental task of demobilizing Canada from its national WWII wartime footing. Hence, the document does not add value to the current argument. Next, prior to WWII, Canada's defence and foreign policies are largely in-step with those of the wider British Commonwealth and thus determined by the British Parliament in Westminster and therefore not relevant either. The 1931 *Statute of Westminster* effectively granted full legislative authority and autonomy to the Dominions of the British Commonwealth with the caveat that the Dominions could allow the British Parliament to retain certain powers in specific areas. It would not be until the 1982 repatriation of the Canadian constitution that the Canadian Parliament was finally autonomous in all jurisdictions. For more information see Canada, *Statute of Westminster, 1931 – Enactment No. 17*, Department of Justice, <http://canada.justice.gc.ca/eng/pi/const/lawreg-loireg/p1t171.html> (accessed 24 March 2013).

<sup>22</sup>Bland, xiv.

No evidence is presented refuting the contention that 9/11 is a strategic shock. However, research clearly indicates that the post-9/11 national security paradigm shift is more akin to a culmination of emerging strategic thought than a wholesale rejection of the legacy paradigm.<sup>23</sup> Hence, it is more apropos to characterize 9/11 as a tipping point. One that forces a decades long trend to finally cross the threshold necessary to shift the national security mindset of both the politicians and the national security establishment.

This section is divided into four sub-sections to better situate Canada's national defence policies within the wider international and domestic security contexts of their respective times. The first sub-section is an explanation of the enduring nuances shaping the Canadian national security lens. Next, the defence policies for the pre-9/11 years and the post 9-11 decade are examined. The final sub-section is a summary of the findings.

#### Nuances of the Canadian National Security Lens

There is no external threat which is unique to Canada. Canada alone cannot assure its own security.<sup>24</sup>

—Canada, *Challenge and Commitment*

To commence a review of Canadian defence policy without first contextualizing some of the unique drivers of Canadian national security policy (NSP) may lead some audiences to draw false conclusions from the subsequent analysis. This brief sub-section aims to expose the salient geopolitical factors that policy makers take into account when assessing the Canadian National Security environment of their time. An understanding of the core drivers will facilitate a deeper appreciation of how Canadian national security appreciations shifted after 9/11. Understanding

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<sup>23</sup>Former MND, The Honourable David Pratt, P.C., telephone interview with author, 24 January 2013 and LGen (ret'd) Michel Gauthier, telephone interview, 24 January 2013.

<sup>24</sup>Canada, *Challenge and Commitment*, 3.

the drivers and the paradigm shift are key to understanding why neither 9/11 nor the attendant policy adjustments are the seminal events leading to the ascendancy of CANSOF.

### National Security Drivers

Variations on the counter-intuitive epigraph above are found in practically every defence policy document. Douglas Bland goes even further by stating, “Canadians tend to approach international relations optimistically, assuming the best of others.”<sup>25</sup> There are a number of reasons these beliefs are held and a review of some Canadian facts sheds light on why this is so.

Canada is the world’s 14th largest economy at \$1.5 trillion USD (2011), and second largest country by landmass. The landmass covers approximately 10 million square kilometers, yet it is sparsely populated with over 90 percent of its 34.3 million inhabitants living within a two-hour drive of the US border. She possesses the world’s largest coastline (approximately 202,000 km) and with the US, shares the world’s longest relatively open and undefended border (approximately 8,900 km). Canada is the US’s largest trading partner and foreign supplier of energy. She benefits from a healthy trade surplus (exporting 75 percent of her goods to the US and 50 percent of her imports come from the US). Therefore, not surprisingly, since Canada is relatively secure and geographically isolated, the national focus tends to shift to other non-defence related national concerns (e.g. national unity).<sup>26</sup>

### National Security Paradigm(s)

Historically, Canada is remarkably consistent blending national defence options with her internal security requirements to create a dual-stream approach to national security.<sup>27</sup> That is to

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<sup>25</sup>Bland, 279.

<sup>26</sup>Central Intelligence Agency, *The World Fact Book*, CIA.gov, <https://www.cia.gov/library/publications/the-world-factbook/geos/ca.html> (accessed 29 January 2013).

<sup>27</sup>There are two fundamental and enduring defence truths that demand stating outright.

say Canada simply cannot afford to unilaterally assure its sovereignty and “we have a proud history of contributing to international peace and security.”<sup>28</sup> So for national defence purposes, Canada engages in active bilateral (e.g. North American Aerospace Defence Command), and multilateral agreements (e.g. North Atlantic Treaty Organization). Canada also actively promotes and advances the ideas of multilateralism (e.g. UN). To assure internal security, Canada takes a different approach employing a combination of various municipal, provincial, and federal departments and agencies.<sup>29</sup>

To simplify the pre-9/11 mindset on national security, it is useful to see national security operationalized around the primacy of borders (i.e. a jurisdictional lens, looking outwards from the national border for defence and inwards for security). One also needs to appreciate there is a lack of an overarching national security framework.<sup>30</sup> The result is seams develop as the system is stove-piped through the various federal departments. Defence is understood as a subset of foreign

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First, Canada’s Armed Forces only have two defence imperatives: defend Canada, and defend North America in concert with the US. Second, “There is no compelling reason drawn from an appreciation of Canada’s security situation that requires Canada to send armed forces overseas.” That is not to say Canada would not deploy forces, it is simply to state that Canada will determine, on a case by case basis, when and where to deploy those forces in order to provide room for “strategic choice.” This idea of strategic choice is an important theme that returns time and again throughout the various defence policies. It is a fundamental conception of how Canada sees itself and its role in world affairs. Canada holds these policy positions because of her geostrategic blessings. Further, as a middle power that possesses no imperial ambitions she has no intention of taking on the responsibility as the world’s police force, preferring instead to work multilaterally to maintain peace and stability. For more see Bland, 3-4.

<sup>28</sup>Canada, *Securing an Open Society: Canada's National Security Policy* (Ottawa, ON: Privy Council Office, National Library of Canada, 2004), <http://publications.gc.ca/collections/Collection/CP22-77-2004E.pdf>. (accessed 27 November 2012), preface.

<sup>29</sup>Unlike the *US Posse Comitatus Act* of 1878 - that generally forbids the domestic use of US Federal Armed Forces - the CAF have a mandated and historically vital role in supporting the civil authorities in times of emergency, crisis or when situations develop that are beyond the civil power’s ability to resolve. For more information read Canada, *National Defence Act*, Justice Laws Website, <http://laws-lois.justice.gc.ca/eng/acts/N-5/>, (accessed 29 January 2013), Part VI.

<sup>30</sup>Canada never formally publishes a National Security Policy (NSP) until April 2004’s release of *Securing an Open Society: A National Security Policy for Canada*, Canada’s first NSP.

affairs policy, while internal security issues are understood as a subset of domestic policy. This tension is exacerbated by the perennial resource shortages within the Canadian defence and security establishment.<sup>31</sup> What is concluded from this duality in approach is that prior to 9/11, national leaders traditionally understand defence and internal security to be separate and distinct elements of National Security. When commenting on the pre-9/11 national security architecture in 2004's NSP, *Securing an Open Society: Canada's National Security Policy*, there is a clear recognition of a "lack of integration in our current system". This acknowledgement of "a key gap which has been recognized" is one of the key drivers to reforming the overall approach to the national security enterprise in the years following 9/11.<sup>32</sup>

Interviews with many experts, including former Minister of National Defence (MND) David Pratt P.C., "in the minds of many officials – both politicians and bureaucrats – there was a paradigm shift" post-9/11.<sup>33</sup> Interviews also reveal there is a new broad-based appreciation that threats to national security do not acknowledge national or provincial borders and cannot be divided into distinct, clear-cut international and domestic dimensions.<sup>34</sup> The old paradigm is

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<sup>31</sup>"As a result of this parsimony and the uneven understanding between politicians and soldiers of what exactly "commitments" mean, Claxton [The Honourable Brooke Claxton, the longest serving MND, 1946-1954] might also have been the father of the "commitment-capability gap" that seems to plague Canadian defence policies." The capability-commitment gap is a long expressed view within Canadian defence circles that believes the GoC has consistently under-programmed DND but over-tasked the CAF. The result is 'hollowed-out' military. DND leaders struggle to maintain core competencies as platforms become obsolete and insufficient personnel numbers become the norm. Bland, 6.

<sup>32</sup>Further proof of this change in Government attitude and perspective is the transformative restructuring of the national security architecture at the national strategic level, to include the creation and appointment of Canada's first national security advisor to the PM. Canada, *Securing an Open Society*, 9.

<sup>33</sup>Pratt interview. See also Patrick Lennox, *At Home and Abroad: The Canada-US Relationship and Canada's Place in the World* (Vancouver, BC: UBC Press, 2009), 119-126.

<sup>34</sup>Pratt interview; Robert R. Fowler, telephone interview with author, 9 January 2013; John G., telephone interview with author, 23 January 2013; Artur Wilczynski, telephone interview with author, 23 January 2013; Gen (ret'd) Ray Henault telephone interview with author,

replaced by “a more integrated approach to national security.”<sup>35</sup> The new system emerges with a symbiotic pairing of the national defence and security establishments (to include an improved security intelligence function), with the singular aim of deterring, preventing, disrupting and defeating threats to national security regardless of their origin. It is as if everyone now understands that Canadians do not live in fireproof houses; far-away problems can impact the lives of ordinary Canadians with deadly and tragic consequences.<sup>36</sup>

To summarize, the geopolitical realities and nuances of the Canadian security environment very much colour how national security risk is measured. Strategic risk assessments drive the policies, priorities, and resources which governments (regardless of nationality) commit to safeguard their national interests. To fully appreciate the Canadian national security paradigm shift after 9/11, the next two sub-sections trace the trends of national defence policy since WWII. It is acknowledged that tracing a trend by only examining one aspect of NSP (in this case defence policy) does not enable a complete analysis. However, it is the author’s opinion that defence policy is the only consistent form of Canadian NSP available to be studied (and published in sufficient quantity), from which one can ascertain the broad patterns and trends so that accurate conclusions can be drawn.

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18 December 1012; Gen (ret'd) Walter Natynczyk, telephone interview with author, 10 December 2012; VAdm (ret'd) Maddison, telephone interview with author, 28 January 2013; and LGen (ret'd) Gauthier interview, 5 January 2013.

<sup>35</sup>Canada, *Securing an Open Society*, preface.

<sup>36</sup>Pratt interview, Fowler interview, Henault interview, and Maddison interview.

### Asymmetric Threats in the Shadows: Policies Pre-9/11

[Crelinsten] argues that despite a “comparatively unremarkable history,” the tale of terrorism in Canada has featured “periods of high drama, significant loss of life, and several ‘firsts,’ including the first political kidnapping (a double one at that) in North America, the early use of multiple attacks long before al Qaeda burst onto the world scene, and the largest mass-casualty attack in aviation history (again a multiple attack) before 9/11.”<sup>37</sup>

—Daveed Gartenstein-Ross, *Terror in the Peaceable Kingdom: Understanding and Addressing Violent Extremism in Canada*

#### The Cold War Years

A review of defence policy from the Cold War years (1964, 1971 and 1987) highlights Canadian thinking on how to deal with various international defence challenges. Governments of the day determine that a reliance “on a strategy of collective security within the framework of the North Atlantic Alliance” as well as actively pursuing and supporting multilateralism (primarily through the UN) will suffice.<sup>38</sup>

This national position is not surprising given the geopolitical factors outlined previously and the fact that Canada is interposed between the world’s two nuclear-armed superpowers. All three Cold War policy documents speak to the same general idea expressed in the 1964 *White Paper on Defence* that, “the range of potential conflict extends from the possibility of all-out thermonuclear war, through large-scale limited war, to insurrection, guerilla activity and political upheaval. Of these, in the scale of probability, nuclear and major non-nuclear war are the least likely.” The paragraph continues, “In respect of lesser conflict, United Nations has shown itself to be a valuable stabilizing and peacekeeping influence.”<sup>39</sup> To conduct peacekeeping operations, the

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<sup>37</sup>Daveed Gartenstein-Ross and Senator Linda Frum, eds. *Terror in the Peaceable Kingdom: Understanding and Addressing Violent Extremism in Canada* (Washington, D.C.: Foundation for Defense of Democracies Press, 2012), [http://www.defenddemocracy.org/stuff/uploads/documents/Peaceable\\_Kingdom.pdf](http://www.defenddemocracy.org/stuff/uploads/documents/Peaceable_Kingdom.pdf) (accessed 21 January 2013), 3.

<sup>38</sup>Canada, *Challenge and Commitment*, 49.

<sup>39</sup>Canada, *White Paper on Defence*, 1964, 11-12.

1971 White Paper *Defence in the 70s* confidently pronounces, “Normal military training prepares the Canadian soldier exceptionally well for this role. Discipline and restraint, which are vital when acting in such a role, are an essential part of military training.”<sup>40</sup> While also acknowledging, “with the limited resources available for the Canadian defence needs, it is desirable to have versatile forces and multi-purpose equipment rather than a high degree of specialization.”<sup>41</sup>

Three deductions are drawn from the above. First, since 1964 Canadian defence policy explicitly acknowledges the existence of irregular conflicts. Second, these conflicts are seen as the most likely national security challenge. Third, the Canadian response to deal with these offshore asymmetrical problems is to consider them collectively as peacekeeping operations. Therefore the conclusion reached is governments expect the CAF to be capable of operating across the spectrum of conflict. Lacking the capabilities to adequately address all the demands expected of them (i.e. the so-called capability-commitment gap), the military leadership takes the only rational course of action available. They focus on core combat competencies based around general-purpose forces (GPF) and resist developing specialized forces.<sup>42</sup> As their primary war fighting tasks demand the CAF remain capable of operating within a NATO coalition for a European ‘Fulda Gap’ environment since “A free and secure Western Europe remains critical to Canada’s future.”<sup>43</sup>

Ron Crelinsten’s article, “Canada’s Historical Experience with Terrorism and Violent Extremism,” provides an excellent summary of Canada’s internal security challenges over the

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<sup>40</sup>Canada, *Defence in the 70s*, 24.

<sup>41</sup>Ibid., 16.

<sup>42</sup>Fowler interview.

<sup>43</sup>Canada, *Challenge and Commitment*, 5. Bland, 111-117.

years. The article specifically notes the historical trend of an increasing number of domestic violent extremist acts.<sup>44</sup> Despite this trend, very little specificity or direction can be found in any of the Cold War defence policies in terms of what capabilities the CAF should possess for the conduct of domestic operations.<sup>45</sup> Research finds that even the mandatory references to enduring national tasks in times of emergency are deliberately understated. *Defence in the 70s* advises the CAF anticipate “the possibility that emergencies will again arise which will necessitate the Canadian Forces coming to the aid of the civil power. It is important that the latter should be able to rely upon the timely assistance from the Forces. The Forces’ role in such situations is important and could be crucial.”<sup>46</sup> Therefore, the conclusion is clear. The CAF’s role is deemed critical to defeat homegrown asymmetrical threats. However, despite the recent “October Crisis”, the national leadership must believe these security challenges do not require specialized military power to resolve.<sup>47</sup>

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<sup>44</sup>Crelinsten, 9-27.

<sup>45</sup>Canadian doctrine has two categories for military operations, War and Operations Other Than War. The detailed explanations of these two categories focus on international scenarios. For more see Canada, Canadian Force Joint Publication 01 - *Canadian Military Doctrine* (Ottawa, ON: Department of National Defence, 2009, [http://www.CAFd-cdf.forces.gc.ca/CAFwc-cgfc/Index/JD/CAFJP%20-%20PDF/CAFJP%2001/CAFJP-01\\_Cdn\\_Mil\\_Doctrine\\_EN\\_2011\\_09.pdf](http://www.CAFd-cdf.forces.gc.ca/CAFwc-cgfc/Index/JD/CAFJP%20-%20PDF/CAFJP%2001/CAFJP-01_Cdn_Mil_Doctrine_EN_2011_09.pdf) (accessed 21 March 2013), 2-12 to 2-14. For more detail on Canadian domestic operations see Canada, Canadian Forces Joint Publication 03 - *Operations (B-GJ-005-300/FP-000)* (Ottawa, ON: Department of National Defence, 2011), [http://www.CAFd-cdf.forces.gc.ca/CAFwc-cgfc/Index/JD/CAFJP%20-%20PDF/CAFJP%203-0/CAFJP\\_3\\_0\\_Ops\\_Updated\\_EN\\_2011\\_09.pdf](http://www.CAFd-cdf.forces.gc.ca/CAFwc-cgfc/Index/JD/CAFJP%20-%20PDF/CAFJP%203-0/CAFJP_3_0_Ops_Updated_EN_2011_09.pdf) (accessed 21 March 2013), Ch. 6 and Canadian Forces Joint Publication 03 - *Operations (B-GJ-005-300/FP-000)*. Ottawa, ON: Department of National Defence, 2011. [http://www.CAFd-cdf.forces.gc.ca/CAFwc-cgfc/Index/JD/CAFJP%20-%20PDF/CAFJP%203-0/CAFJP\\_3\\_0\\_Ops\\_Updated\\_EN\\_2011\\_09.pdf](http://www.CAFd-cdf.forces.gc.ca/CAFwc-cgfc/Index/JD/CAFJP%20-%20PDF/CAFJP%203-0/CAFJP_3_0_Ops_Updated_EN_2011_09.pdf) (accessed 21 March 2013). For more specific information read Canadian Forces Joint Publication 3-2 – *Domestic Operations (B-GJ-005-302/FP-001)* (Ottawa, ON: Department of National Defence, 2011), <http://www.CAFd-cdf.forces.gc.ca/sites/page-eng.asp?page=12540> (accessed 21 March 2013).

<sup>46</sup>Canada, *Defence in the 70s*, 11. For more information on the legal authorities for the CAF’s conduct of domestic operations see: Canada, *National Defence Act*, Part VI.

<sup>47</sup>This footnote advances a new and nuanced perspective on CAF domestic operations, which is also informative as to understanding why the alternative narratives are false. Whereas

## National Security Architecture – The Cold War Years

In fairness to the national leadership of the 60s, 70s and 80s, it is obvious within the documentation that various governments acknowledge the changes occurring within their respective security environments. A trend line concerning asymmetrical threat awareness is discernible and in response organizational changes occur within the wider national security architecture. However, it is postulated that the changes are more about improving governance and oversight to achieve cost-efficiencies than focusing on creating new capabilities (e.g. by changing reporting lines). Nevertheless the policies are clear, specialized capabilities are not developed within DND despite the rise of non-traditional threats, as combat capable GPF are deemed sufficient to meet Canada's external defence and internal security needs.<sup>48</sup>

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the continuum of operations has long been thought of in an expeditionary setting, there is also a continuum for domestic responses. However, Canadian doctrine does not explicitly express this idea. Therefore the following is offered. At one end of the domestic continuum, GPF are the optimum forces and the best tool (e.g. for routine operations such as sovereignty patrols or emergencies such as responses to natural disasters), while on the other extreme rests irregular forces such as SOF (e.g. in response to terrorism). To simplify and anchor this new continuum, the two extremes are broadly categorized as operations to assist civil authorities (GPF end of the continuum) in contrast with operations to aid the civil power (SOF end of the continuum). Hence, the perspective advanced herein must be viewed where the CAF's employment in certain situations (i.e. higher risk operations to aid the civil power), means de facto they are operating within an asymmetrical environment due to the unusual state-versus-non-state actor dimension. Thus, by extension, the government has consistently expected the CAF provide a capability for this eventuality. The domestic employment of the CAF is legally codified in various legislative acts (e.g. the *Emergencies Act*, the *National Defence Act*).

<sup>48</sup>Three examples do stand out and are worth mentioning to make the above point. First, the 1964 policy outlines a plan for the Canadian Army (then known as Mobile Force Command) to re-structure its fourth brigade into the Special Service Force. Today experts agree it would not be considered SOF in the contemporary sense. However, it is fair to describe them as an extremely capable, air mobile, US Ranger Regiment type organization with the tasks of executing a variety of missions for the defence of Canada including internal security. Therefore, the leadership of the day does attempt to deliver a specialized capability in response to emerging asymmetric threats. Albeit using airborne light infantry because of the rationale surrounding, and emphasis placed upon, the versatility of GPF. For the times and likely threats facing Canada this strategic calculation is considered sound. Next, according to former DM Bob Fowler, two other marginal improvements were made. In the early 1980's the Canadian Security Intelligence Service (CSIS) is established as a separate operating agency after a series of embarrassing, scandals involving the RCMP and their modus operandi in the security intelligence realm. Lastly,

Therefore, the author concludes a belief in the status quo is the dominant policy position and despite some efforts on the margins across government, the national security establishment largely eschews specialized capabilities. This is attributed to the fact that the legacy national security paradigm remains and with DND possessing versatile GPF, Canada possesses good 'strategic choices'. Notwithstanding that the adjustments on the margins remain an obvious indication of the GoC's acknowledgement of the increasing incidence of asymmetrical threats.

### The Post-Cold War Decade

The decade of the 1990s is ushered in with the 1989 strategic shock that is the unexpected end to the Cold War and the dawn of a new multipolar world. This new multipolarity in world affairs has minimal impact on Canadian national security as her only terrestrial neighbour is the world's sole superpower. A global hegemon that is unequalled on the battlefield, as evidenced by the high-tech, surgical and relatively bloodless 1991 US victory in Operation Desert Storm.

Canadian analysis, as expressed in the 1992 *Defence Policy*, states "many of the assumptions which underpinned our security policy for over forty years are no longer valid." The 1994 *White Paper on Defence* articulates a belief, "At present, there is no immediate direct military threat to Canada, and today's conflicts are far from Canada's shores."<sup>49</sup> Notably though,

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after years of debate at the national level - over the operational requirement for a bona-fide counter-terrorism capability - a decision is finally reached that Canada must develop this capability. But neither successive CDS's nor Commissioners of the RCMP want the task, as each see it as a paramilitary role/type of organization that would be detrimental to their respective organizational cultures. In the end, in response to continuing extremist events involving Canadians in the 1980s, the RCMP is given the task and the Special Emergency Response Team (SERT) is formed in 1986. The RCMP sees the SERT capability to be both costly and underemployed, and thus is eager to shift the responsibility elsewhere to achieve resource savings as soon as the opportunity arose. Two events conspire to create that opportunity in the early 1990s. The Cold War's end and Canada's worsening fiscal situation. For more see David Pugliese, *Canada's Secret Commandos: The Unauthorized Story of Joint Task Force Two* (Ottawa, ON: Esprit de Corps Books, 2002), Ch. 2.

<sup>49</sup>Canada, *1994 White Paper on Defence* (Ottawa, ON: Department of National Defence, 1994), <http://www.forces.gc.ca/admpol/downloads/1994%20White%20Paper%20on%20>

the *1994 White Paper* also reflects on the challenges posed by “Failed States . . . and the Resurgence of Old Hatreds.” Claiming “Among the most difficult and immediate challenges to international security are civil wars fuelled by ethnic, religious and political extremism” observing that the strength of non-state actors and fundamentalist groups are growing considerably. Taken in combination with the test to Canadians’ traditional understanding of benign peacekeeping operations (e.g. Cyprus, Golan Heights, Sinai), as United Nations operations are failing badly almost everywhere (e.g. Somalia, Bosnia, Rwanda, Haiti), many officials are perplexed as to the way forward.

Domestically Canada continues to experience internal security challenges. National unity is again under assault from a resurgent Quebec separatist agenda as well as First Nation unrest among others challenges.<sup>50</sup> But in the early 1990s, Canada’s sovereignty is threatened from an entirely different quarter: an out of control and rapidly worsening national fiscal situation. As the largest federal department, and with Canadians wanting a Cold War ‘peace-dividend’, DND is expected to shoulder a disproportionate share of the national deficit/debt reduction. The 1992 policy is explicit: “fiscal restraint means that the size of the Regular Forces will decline.”<sup>51</sup> Two years later with the annual debt servicing payments consuming 27 percent of the total federal budget and climbing, the *1994 White Paper* is even starker stating, “most areas of defence will be cut” and “personnel cuts will continue.”<sup>52</sup> The conclusion drawn is that DND and the CAF are going to be asked ‘to do less with less’ because the national security threat is diminished.

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Defence.pdf (accessed 27 November 2013), 3.

<sup>50</sup>Crelinsten, 16.

<sup>51</sup>Canada, *Canadian Defence Policy* (Ottawa, ON, Department of National Defence, 1992), [http://www.forces.gc.ca/admpol/downloads/CanadaDefPolE\\_all.pdf](http://www.forces.gc.ca/admpol/downloads/CanadaDefPolE_all.pdf), (accessed 27 November 2013), 12.

<sup>52</sup>The magnitude of these cuts is best summarized by quoting directly, “the defence funding assumptions contained in the 1994 budget envisaged a level of defence spending in the

## National Security Architecture – The Post-Cold War Decade

In analyzing the 1992 and 1994 policies two key points emerge. First, although the international and national security environment is in constant flux, the greatest threat to Canada is a fiscal one.<sup>53</sup> Second, the 40-year conception of, and the accepted capabilities required to defend and secure the nation, are shifting.<sup>54</sup> This shift does not yet however produce a new paradigm.

There is strong evidence of a convergence of ideas on the existence of a common element to both the domestic and international security environments, namely irregular warfare methodologies. Evidence indicates that despite imposing 25 percent cuts to the overall defence program, the GoC understands it must preserve its small, yet core domestic counter-terrorism (CT) capability as asymmetric threats are coming to the fore globally. As a result the GoC announces with two understated lines (buried deep within the 38-page 1992 defence document) the national mandate for the CT mission is transferring from the Royal Canadian Mounted Police (RCMP) to the CAF. The CT mission is assigned to a new unit (JTF 2) that “would be composed of carefully selected military personnel from across the Canadian Forces.”<sup>55</sup> Although acknowledging the operational requirement for a specialized force to combat terrorists at home,

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year 2000 that, in real terms, would be less than 60% of that assumed in the 1987 *Defence White Paper*.” Canada, *1994 White Paper on Defence*, Ch. 2.

<sup>53</sup>Bland, 282.

<sup>54</sup>Pratt interview, Fowler interview, John G. interview and Gauthier interview. Further, “The debate, generally, exposed two approaches to restructuring the armed forces. On the one hand stood those, mostly from within the defence establishment, who wanted to retain traditional conventional warfare “general purpose forces” capable of engaging in classical total war military activities. On the other hand, most from outside the defence establishment, proposed Canada develop military capabilities especially suited to a world characterized by regional conflict and low-level military operations.” Bland, 282.

<sup>55</sup>Canada, *Canadian Defence Policy*, 1992, 31.

there is no mention of special operating forces or any expectation that the CAF will develop other irregular capabilities.<sup>56</sup> The paper will now examine the post-9/11 Canadian mindset.

### Asymmetrical Threats in the Main: Policies Post-9/11

Canadians live in a world characterized by volatility and unpredictably.<sup>57</sup>

—Canada, “*Canada First*” *Defence Strategy*

The 2005 and the 2008 defence policies are unambiguous about GoC intent for DND and the CAF. This is due to two factors. First, after 9/11 the national security paradigm shifts as discussed below. Coupled with this change in mindset is the April 2004 release of the capstone *Securing an Open Society: Canada’s National Security Policy*, “the historic step of issuing Canada’s first-ever comprehensive statement of national security policy which provided an integrated strategy.”<sup>58</sup> This national strategic coherence during the first decade of the twenty-first century stands in stark contrast to the absence of any during last half of the twentieth century.

### A Singular National Security Environment

Twenty-four Canadians were killed in the attacks of 9/11. As Ron Crelinsten notes, “Those events were a stark reminder to Canadians of the tragic loss of 329 lives aboard Air India flight 182 in 1985.”<sup>59</sup> A nefarious combination of violent non-state actors, globalization and

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<sup>56</sup>According to Col Mike Rouleau, “prior to 9/11 there was direction from within the CF that the terms special operations, special forces or SOF were not to be used as they did not exist in Canadian doctrine or lexicon and their usage connoted ‘elitism’ that was not in vogue.” DM Fowler supports this notion that elitism within the CAF was frowned upon by the political and military leadership.

<sup>57</sup>Canada, “*Canada First*” *Defence Strategy* (Ottawa, ON: Department of National Defence, 2010), <http://www.forces.gc.ca/site/pri/first-premier/defstra/finance-eng.asp> (accessed 20 March 2013), 6.

<sup>58</sup>Canada, *Securing an Open Society*, preface.

<sup>59</sup>The Air India explosion over the Pacific Ocean (the vast majority of those killed were Canadians of Indian Origin) was the worst terrorism-related aviation disaster until 9/11. For more

twentieth century technology collapse two Canadian national security beliefs. The first, that time and space effectively separates Canada from the world's troubles and threats. Secondly, the long held notion that conceptually there is a distinction between external defence and internal security. In sum, 9/11 strongly validates the fact that National Security has inseparable domestic and international implications.

### A New National Security Architecture

Between the years 2001-2003 the federal government takes unambiguous and decisive action to address many pan-governmental security gaps at the strategic/departmental levels.<sup>60</sup> But until the 2004 NSP is published national strategic incoherence remains. The clarity resulting from the 2004 NSP capstone document enables DND to publish *Canada's International Policy Statement: A Role of Pride and Influence in the World – DEFENCE*. Within is an articulation of a new vision to transform the CAF. Significant re-investment and capability enhancement are on the horizon. Taken with a new foreign policy document the three are synchronized and crystal clear in articulating GoC national intent. They underline the rationale for the new national security approach and outline how the GoC intends to resource and implement its vision.<sup>61</sup>

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information, see Crelinsten, 23.

<sup>60</sup>However due to the perceived urgency and uncertainty of the times, most of these announcements and policy directives were enacted piecemeal through various executive (e.g. the 12 Dec 2001 announcement of the 32 point Canada-US Smart Border Declaration and Action Plan), legislative (e.g. The Public Safety Act of 2002) or budgetary processes (e.g. direct investments of over \$8 billion (CAD)). For information that is more detailed see Lennox, Ch. 6.

<sup>61</sup>Although intended as a companion piece to a new foreign policy, in fact the defence policy precedes the foreign policy by many months. This would mark the beginning of a period when DND is often accused of leading and in front of other national policy deliberations. See Janice Gross Stein and Eugene Lang, *The Unexpected War* (Toronto, ON: Viking Canada, 2007), 152-159; General Rick Hillier, *A Soldier First: Bullets, Bureaucrats and the Politics of War* (Toronto, ON: HarperCollins Publishers Ltd., 2009), 319-323 and 345-350; and Canada, *Canada's International Policy Statement: A Role of Pride and Influence in the World – OVERVIEW* (Ottawa, ON: Department of Foreign Affairs and International Trade, 2005).

Most germane to this paper is the new lexicon and prominence that special operations (SO) capabilities and JTF 2 garner throughout both the 2004 NSP and 2005 defence document. The prominence of irregular forces indicates the capability is being expanded, adding military strategic options to the defence arsenal. Notwithstanding the more than 40 times that JTF 2 or SO are mentioned within the 2005 defence policy, one paragraph in particular highlights the unambiguous thinking about this new SOF capability for the CAF. In addition to announcing other joint formations the CAF will be capable of deploying, which interestingly also highlight the potential employment of SOF within their descriptions, the 2005 policy states:

A Special Operations Group will be established to respond to terrorism and threats to Canadians and Canadian interests around the world. This group will include Joint Task Force 2, our special operations and counterterrorism unit; a special operations aviation capability centred on helicopters; and supporting land and maritime forces. The Special Operations Group will be capable of operating as an independent unit or contributing to other joint force structures. Integrating our special operations forces in this manner will increase their impact in operations, as well as the range of options available to government in the deployment of the Canadian Forces.<sup>62</sup>

The 2008 “*Canada First*” *Defence Strategy* maintains the same theme with pronouncements of additional investments across the CAF. “*Canada First*” promises to deploy personnel capable of operating “in the full spectrum of operations” as well as grow and “strengthen key joint and enabling capabilities, including . . . special operations forces.”<sup>63</sup>

In sum, it is clear from analyzing the 2004 NSP and the 2005 and 2008 defence policies that philosophically the 40+ year trend culminates and the national security paradigm shift is complete. As a result, the GoC has DND shift its main effort. From preparing for a GPF-centric, symmetrical fight on the European continent to one where executing global operations in an asymmetrical environment is the norm with SOF gaining a new place of strategic visibility.

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<sup>62</sup>This document is widely acknowledged as the vision of ret'd CDS Gen Rick Hillier. He also recounts the story within his book *A Soldier First: Bullets, Bureaucrats and the Politics of War*, 321-323.

<sup>63</sup>Canada, “*Canada First*” *Defence Strategy*, 9, 15.



### Summary of Defence Policy Findings

The world is neither more peaceful nor more stable than in the past. Canada's defence policy must reflect the world as it is rather than the world as we would like it to be.<sup>64</sup>

—Canada, *1994 White Paper on Defence*

According to Douglas Bland, PhD, in *Canada's National Defence: Volume 1 Defence Policy*, regardless the period, Canadian defence policy documents “have been simple pronouncements of the status quo.”<sup>65</sup> This is inferred to mean the maintenance of combat-capable GPF for expeditionary, symmetrical conflicts. However, when studying those same defence policies from the viewpoint of an experienced CANSOF senior officer, a different perspective emerges. Contained alongside the perennial desire for GPF, an expectation is also consistently expressed that “There are, in addition, certain national tasks of a military or quasi-military nature for which the Department of National Defence has some responsibility.”<sup>66</sup> This is a direct expression that the CAF has an explicit task to conduct ‘national tasks’, and as already explained, this infers within an asymmetrical environment. However, despite re-confirming this national task-set in every policy statement, the GoC is not explicit about what is expected in terms of CAF operational outputs until 2005. Where for the first time there is unambiguous direction for a SOF capability to combat asymmetrical threats. Because of this strategic clarity vis-à-vis SOF, a commonly held view is that 9/11 causes CANSOF’s ascendancy. It is true that 9/11 is a transformative event which changes mindsets. However, the leap that 9/11 is therefore the seminal event leading to CANSOF’s rise to strategic relevance is false logic.

The research simply does not support this contention. 9/11 is a strategic shock, but more importantly to Canadians, it is the tipping point enabling a wider shift within the GoC’s thinking

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<sup>64</sup>Canada, *1994 White Paper on Defence*, 2.

<sup>65</sup>Bland, xi.

<sup>66</sup>Canada, *White Paper on Defence*, 1964, 13.

and perspectives about all defence and security issues. 9/11 is the forcing function that clarifies the symbiotic relationship between national defence and internal security, and thus a new paradigm is born. This includes a complete reevaluation of where national security investments need to occur.<sup>67</sup> But this paradigm shift, appearing to be a direct result of 9/11, is in fact the culmination of a 40+ year trend. This trend shows a consistent recalibration of the national threat appreciation as a result of a transforming national security environment. The 1992 policy document specifically supports this stating, “Canadians are enlarging their definition of national security and looking to the Canadian Forces to play a greater role in assistance to civil authorities.”<sup>68</sup> The paradigm shift is also formal recognition that the previous lack of a national security strategy created gaps and seams between the defence and security establishments. The post-9/11 policy shifts are noteworthy not due to a change in Canada’s historical preferred path of multilateralism (through leading international institutions such as the UN, NATO or the G8), but through the need to strengthen and employ a more muscular, expeditionary military (both GPF and SOF).<sup>69</sup> To achieve this the GoC directs that DND, as a ‘hard’ instrument of national power, requires robust and complimentary regular and irregular capabilities for Canada to assure her national security.

Therefore, 9/11 does not in-and-of-itself create CANSOF strategic relevance, but it does play a significant role. 9/11 creates the necessary change momentum which various leaders can build upon. With the paradigm shift, CANSOF as an institutional outlier is postured to benefit, as its domestic CT mandate is officially expanded in the 2004 NSP “to counter terrorism both at

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<sup>67</sup>Pratt interview, Henault interview, and Maddison interview.

<sup>68</sup>Canada, *Canadian Defence Policy*, 1992, 38.

<sup>69</sup>Two recent books highlight Canada’s new appreciation of its place and responsibilities in a post 9-11 world. Patrick James, *Canada & Conflict: A hard-hitting look at Canadian security post-9/11, from the Afghanistan war to US relations and Arctic sovereignty* (Oxford, UK: Oxford University Press, 2012), Ch. 2 and Lennox, Ch. 6.

home and abroad.” Further, CANSOF profits again as the NSP states, “getting the right balance between domestic and international security concerns will be an important consideration in determining the roles and force structure of the Canadian Forces.”<sup>70</sup> Thus, CANSOF is operating on the leading edge of two new GoC focus areas. The first is a focus on whole-of-government approaches to national security. The second is the inversion of primary missions for the CAF. The in-extremist national task of yesteryear becomes the new primary mission, a mission and a new asymmetrical global security environment for which irregular forces are optimized.<sup>71</sup>

Taken from a different perspective, it is logical that national leaders during the Cold War years place their weight of effort in favour of GPF for operating in a symmetrical security environment. So, although irregular conflicts are on the rise, from the unique Canadian perspective, they are understood to be the result of ineffective peacekeeping operations and therefore localized, offshore problems. And even though Canada experiences her own internal security challenges, these are seen as aberrations, and relatively low-consequence events. In hindsight, whether this line of reasoning is appropriate is immaterial, as Canada never suffers a catastrophic attack. To be fair, the author acknowledges national leaders adjust to the realities of their evolving and complex security environment. The author’s conclusion though is their greatest challenge is the national security system, as it is still fixed in the legacy paradigm.<sup>72</sup>

In sum, the research supports the contention that policy is extant for an irregular capability within the CAF. Further, the national security paradigm shift after 9/11 is simply the culmination of a long-term trend in need of a final push. Post-9/11 CANSOF is positioned to

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<sup>70</sup>Canada, *Securing an Open Society*, 48.

<sup>71</sup>Ibid., vii.

<sup>72</sup>This line of reasoning would remain a touchstone in government circles and as such, it is not until the late 1980s (SERT) and then 1992 (JTF 2) that government commences the process that eventually (20+ years later) creates dedicated, operationally viable, first world counter-terrorism capabilities.

benefit from this new paradigm as CANSOF has a foot in both the international and national arenas and is a force optimized for this emerging asymmetrical national security environment. Neither 9/11, nor policy changes are the seminal event which create CANSOFCOM. Therefore, another reason must exist. The next section examines CANSOF's history to ascertain the seminal moment that drives CANSOF to its current fourth service stature.

## CANADIAN SPECIAL OPERATIONS FORCES

FACTA NON VERBA (Deeds Not Words)

—Motto of Joint Task Force Two

VIAM INVENIEMUS (We Will Find a Way)

—Motto of CANSOFCOM

This section examines CANSOF over its twenty year history. Within is highlighted the capability's propensity for growth. Not only in terms of organizational structure or capability depth and breadth, but also in terms of CANSOF's visibility. Specifically the wider awareness of its strategic utility within the defence, security and political establishment of Canada.

For use herein, strategic relevance consists of two mutually supporting concepts. First is the resource requirement for cost-effectiveness insofar as finite national security dollars are concerned. There is no issue with expert opinion stating CANSOF is cost-effective for the GoC and this point will not be argued.<sup>73</sup> Second is the operational requirement, where the capability expands the military strategic option space. It is primarily within this domain that the main argument is proven. When paired, if the sum is positive then the concept is politically favourable, institutionally legitimate and with the proper allocation of resources (i.e. dedicated people and funding) operationally viable.

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<sup>73</sup>John G. interview, Wilczynski interview, Fowler interview, Henault interview, Maddison interview, Horn interview, and Pugliese interview.

The first sub-section on CANSOF pre-9/11 establishes the baseline so growth over its lifespan can be holistically appreciated. The post-9/11 period is studied over two different timeframes: the years 2001-2005 (prior to the stand-up of CANSOFCOM), and the years 2006-2012 (after the stand-up of CANSOFCOM). Using this approach it is clear that as a result of the the 2001-2002 OEF contribution, CANSOF is rapidly transformed from a strategic resource (i.e. an asset) into a strategically relevant instrument of national military power.

#### CANSOF - A Strategic Resource: 1992-2001

In addition, responsibility for the Special Emergency Response Team function will be transferred from the Royal Canadian Mounted Police to the Department of National Defence . . . The military team, to be known as Joint Task Force Two<sup>74</sup>

—Canada, *Canadian Defence Policy*, 1992

As discussed early, Canadian national leaders of the late twentieth century face a number of strategic dilemmas. One result of their many deliberations is the creation of JTF 2 (making it the cradle of the contemporary CANSOF capability). From the moment JTF 2 is declared operationally ready on 1 April 1993, no evidence refutes retd Deputy Minister (DM) Robert Fowler’s contention that JTF 2 “is a vital, national asset.”<sup>75</sup> This is a widely accepted statement even though evidence strongly indicates that during its first decade JTF 2 is not a well known entity nor is its strategic utility appreciated outside of a select few DND insiders.<sup>76</sup>

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<sup>74</sup>Canada, *Canadian Defence Policy*, 1992, 31.

<sup>75</sup>Fowler interview.

<sup>76</sup>The majority of interviewees substantiate David Pugliese’s remark (made in his book) when a former Member of Parliament states, “We have a great team. . . And most Canadians haven’t a clue that we have these special forces out there, able to take care of us.” Pugliese, 179.

## Structure 1992-2001

At activation, JTF 2 is comprised of a small headquarters element, a very small staff (including various CT enabling functions), one assault troop, a sniper troop, and a dedicated training cadre. The total strength is approximately 100 personnel; two-thirds of which are assaulters with one-third as support personnel.<sup>77</sup> JTF 2 is supported by a dedicated aviation flight that provides three helicopters and crews trained in advanced, hostage rescue flight profiles. Additionally, there is a staff directorate of one to two senior staff officers working at National Defence Headquarters in Ottawa.<sup>78</sup> During these early days, JTF 2 is CANSOF. It is everything, in due deference to the fine aviators of the small aviation detachment known as ‘B’ Flight.

Despite the “massive financial cuts” to DND during the 1990s, CANSOF grows quite steadily over the next eight years in both capacity and capability (less the staff directorate and aviation flight, both of which remain unchanged until the 2000s).<sup>79</sup> In 1994 the first true sabre squadron stands up with its own squadron commander, headquarters and multiple troops. By the late 1990s, CANSOF grows to the point where former assault squadron commander Colonel (Col) Mike Rouleau states he “had 99 assaulters alone in my sabre squadron.” This growth enables a second sabre squadron to be created in 1999.<sup>80</sup> By the summer of 2001 unit strength is

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<sup>77</sup>Within JTF 2 sub-units were called squadrons vice companies and sub-sub-units were called troops vice platoons. To differentiate between the types of squadron the functional identifier of sabre (a tactical or fighting squadron), support, or training is added. For troops the same naming convention exists but is even more specific, therefore assault troop (fighting element), sniper troop, communications troop, maintenance troop, etc. is commonly used. The CT ‘operators’ of JTF 2 are known as assaulters.

<sup>78</sup>MGen D. Michael Day, telephone interview with author, 18 December 2012; Col Mike Rouleau, telephone interview with author, 19 December 2012; CWO Wayne Duggan, telephone interview with author, 29 January 2013; and MWO Bruce B., telephone interview with author, 4 April 2013.

<sup>79</sup>For more information see Bland, 281-286 and Hillier, 114.

<sup>80</sup>Rouleau interview; Duggan interview; Bruce B. interview; Col (retd) Michael Beaudette, interview with author, 21 January 2013; and CWO (retd) Mike Anderson, e-mail

approximately 350 personnel and organized as follows: an appropriately sized headquarters element, an operations squadron, multiple sabre squadrons (with multiple troops), a combat support squadron, a combat service support squadron, and a training squadron.<sup>81</sup> The key deduction is CANSOF demonstrates a consistent propensity for growth during its first decade in existence. The conclusion is CANSOF is strategically important for this to occur as the institution supports this growth; despite the fact DND is short of funding and cutting capabilities elsewhere.

### Command and Control (C2)

JTF 2 is a joint organization has been since inception. For the first 13 years JTF 2 is under the C2 of the Deputy Chief of Defence Staff (DCDS), known colloquially as the CF's 'three-star operations officer (Ops O)'. The decision to place CANSOF within the joint realm, vice inside one of the regular Services (as the majority of Canada's key allies have done with their respective SOF organizations) is an early decisive point. Arguably it is a seminal decision in its own right due to the many challenges DND will face over the coming decade.<sup>82</sup>

In hindsight the decision to put JTF 2 under the DCDS provides many advantages, most importantly institutional level strategic oversight.<sup>83</sup> Next, by being under the 'three-star Ops O',

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correspondence with author, 8 February 2013.

<sup>81</sup>Since 2001 CANSOF strength has expanded again, however, the structure has remained largely the same. Duggan interview and Bruce interview.

<sup>82</sup>The so-called "Decade of Darkness" according to Hillier, Ch. 7.

<sup>83</sup>For example, CANSOF was relatively unencumbered by the large institutional dilemmas of the day (e.g. the so-called Somalia Affair, budget cuts and personnel reductions). For a more in-depth understanding of the impact of the Somalia Affair read David Bercuson, *Significant Incident: Canada's Army, the Airborne, and the Murder in Somalia* (Toronto, ON: McClelland and Stewart Inc., 1996). Former DM Fowler adds his perspective on the Somalia affair and its impact on CANSOF growth when he states, "In the aftermath of the torture-murder of Shidane Arone [16 year-old Somali male] and it's handling within essentially 'The Army,' it is fair to say that outside DND and the CF, Airborne or, indeed, 'Special' forces were not the flavor of the month for some years. Inside the defence establishment, very much including the Army, the situation was little different. I would contend that what your cousins call "Big Green Army"

for CANSOF the chain of command is very short, eliminating a number of non-contributing layers. CANSOF funding is also protected (even though its budget is pennies on the dollar compared to the Services' budgets) from the insidious, routine practice within the regular forces where each layer of command takes its slice of available funds. Also, according to Col Mike Rouleau, "JTF 2's freedom of action and creativity in the trial, test and validation of various tactics, techniques and procedures (TTPs) was at its zenith. This was operationally essential for a young and maturing organization trying to earn their spurs." Most importantly, according to the DCDS on 9/11, Vice Admiral (VAdm) (ret'd) Greg Maddison, the DCDS has complete visibility on the capability and, "I could see what was in the art of possible, due to the uncommon maturity, dedication and professionalism of JTF 2's members. I knew the capability, the organization and trusted its leadership." Such routine, early engagements with DND's most senior leaders imbues in CANSOF an ethos of 'never-breaking-trust' and 'speaking truth-to-power' that remain CANSOF maxims today.<sup>84</sup> Immediately after 9/11 this familiarity and trust are important factors at the military strategic level when deployment deliberations occur.

Finally, there is no way of knowing what the exact affects on CANSOF's organizational maturation, élan, and esprit d'corps might have been had JTF 2 been placed under one of the regular services. However, it can justifiably be stated that those effects would have produced more negatives than positives.<sup>85</sup> This is due to the fact that the 1990s are a very difficult period

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has always been the most vociferous opponent of Canada's developing an effective SOF capability. The Airborne Regiment's disgrace gave them a lot of ammunition to keep the concept contained, particularly as the politicians, who had been badly shaken up by the Somalia fiasco, could be counted on to support Army-think. It was, I believe, Vice Admiral Larry Murray as DCDS, who was instrumental in keeping JTF 2 out of the suffocating clutches of "the Army." Had it not been for the Somalia Affair, I think the CF SOF capability would have developed more rapidly than it did." Fowler email correspondence 21 March 2013. For other comments see also Hillier, Ch. 7.

<sup>84</sup>Henault interview and Maddison interview.

<sup>85</sup>Fowler interview.

for the regular forces (e.g. defence cuts) as the Service leaders struggle to preserve GPF core combat competencies.<sup>86</sup> The tough times create morale problems within the regular forces as well as a hollowing out of the CAF's overall war fighting capabilities.

#### Capability Analysis 1992-2001

The official JTF 2 mission statement has changed very little since the unit's activation. What has changed over the years though, has been the expectations of what effects CANSOF must deliver. JTF 2 begins in 1992 with a single mandate: hostage rescue; and a singular expectation: the operational environment is land-centric, confined to Canadian legal jurisdictions and encompasses the CT basics of 'barricaded strongholds, trains, planes and automobiles'. JTF 2's Regimental Sergeant-Major and the Operations Squadron Sergeant-Major both confirm that notwithstanding the primacy of the domestic CT mission, during the first couple of years in existence CANSOF is tasked to execute other international operations 'in the national interest'. This is in accordance with the second half of the unit's official mission statement.<sup>87</sup>

By the summer of 2001, CANSOF can execute the basic HR mission set exceptionally well and is beginning to develop a maritime counter-terrorism capability, as none exists within

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<sup>86</sup>For an exceptional historical account of the Canadian experience with irregular forces read LCol Bernd Horn's *Bastard Sons: An Examination of Canada's Airborne Experience 1942-1995*. The book provides a very telling glimpse of what might have become for a niche capability such as CANSOF, had it resided within the Canadian Army of the 90's. Further, according to many retired senior officers – including such authorities as former CDSs Gens (retd) Henault, Hillier and Natynczyk – the 1990s and early 2000s is a period when many of the most senior leaders of DND/CAF are simply in damage control mode, avoiding risk and doing everything they can to keep the CAF from total collapse while trying to "survive."

<sup>87</sup>JTF 2's unclassified mission statement: "JTF 2 is responsible for providing to Canada a force capable of rendering armed assistance in the resolution of an issue or a potential issue that affects national security. While JTF 2's primary role is counter-terrorism, its personnel can be employed in any type of military operations, which include, but are not limited to, surveillance, security advice and close personal protection." Canada, "Joint Task Force Two, " National Defence and the Canadian Forces, <http://www.jtf2-foi2.forces.gc.ca/index-eng.asp> (accessed 9 January 2013). Rouleau interview, Horn interview, Duggan interview, and Bruce B. interview.

Canada. JTF 2 is also growing its expertise in many other CT enabling functions. Not only is this supported by the institution, it is directed.<sup>88</sup>

However operations shortcomings and capability gaps exist. Despite nearly a decade of growth, CANSOF is still very much in its formative phase. For such a small organization, that is continuously pushing the tactical bounds, it is justifiable that the occasional seam opened. Although proving itself tactically proficient during training, there are a number of striking operations shortcomings. Notably, there is inexperience for combat proven tactical C2.<sup>89</sup> A larger C2 deficiency exists at the operational and strategic levels. Second, CANSOF is challenged in projecting force (i.e. getting to the objective) at all levels. Compounding the above, CANSOF interoperability with domestic agencies and international allies is very limited. This gap is assessed in the truest sense of the military understanding of the term (e.g. operationally validated in the crucible of combat).<sup>90</sup>

There are many good reasons for this sub-optimal state of affairs (e.g. JTF 2 uses non-standard equipment as well as unique tactics, techniques and procedures (TTPs) in comparison with the CAF, Canadian law enforcement agencies, and allied SOF). However, two good examples confirm the existence of wider systemic issues.

From the domestic strategic level there is not a codified and rehearsed national CT plan, as a subordinate, nested plan within a capstone national security strategy. Therefore productive joint and interagency engagements are episodic at best. This is exacerbated by JTF 2 organizational immaturity at the time (e.g. occasionally the mantra of operations security is taken

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<sup>88</sup>Day interview; Beaudette interview; Rouleau interview; and Col (ret'd) Clyde Russell, interview with author, 17 December 2012.

<sup>89</sup>Pugliese, 122-123.

<sup>90</sup>Beaudette interview and Duggan interview.

to the absurd where even the most benign information is not shared).<sup>91</sup> As a result, outside the tactical domain of ‘actions on the objective’ JTF 2 lacks productive engagements with national security or other key enabling partners (e.g. the Royal Canadian Air Force).<sup>92</sup> This lack of interaction and openness with the very organizations that JTF 2 requires for essential operations support causes unnecessary friction within the wider defence and security establishment according to many Canadian experts.<sup>93</sup> The author concludes the lack of a rehearsed national plan, the existence of C2 and force projection challenges at all levels and JTF 2’s unwillingness to share information proves operations gaps exist that cannot be bridged.

From the international perspective, despite demonstrating exceptional tactical creativity and skill on small-unit exchanges with key allies, the 4-Eyes CT fraternity considers JTF 2 as ‘untested’.<sup>94</sup> For a fraternity as tight and closed to outsiders as the international Tier 1 CT community is, the full price of admission is proven combat prowess before you become a ‘trusted agent’ and gain complete access.<sup>95</sup> Hence the deduction is key allies do not see CANSOF as a valuable contribution to their efforts. This remains largely the case until CANSOF’s OEF performance during 2001-2002.

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<sup>91</sup>LGen (retd) Marc Dumais, telephone interview with author, 29 January 2013 and David Pugliese, telephone interview with author, 21 January 2013.

<sup>92</sup>Canada did not formally publish a Counter-Terrorism strategy until late 2011 although there were numerous draft versions circulating over the years. For more information see Canada, *Building Resilience Against Terrorism: Canada’s Counter-Terrorism Strategy* (Ottawa, ON: Her Majesty the Queen in Right of Canada, 2011), [http://www.publicsafety.gc.ca/prg/ns/\\_fl/2012-cts-eng.pdf](http://www.publicsafety.gc.ca/prg/ns/_fl/2012-cts-eng.pdf). (accessed 12 September 2012).

<sup>93</sup>Pratt interview, Maddison interview, Dumais interview, and Pugliese interview.

<sup>94</sup>Duggan interview, Rouleau interview, and Beaudette interview.

<sup>95</sup>Canada’s Tier 1 partners are the CT units of the US (Joint Special Operations Command), United Kingdom (Special Air Service and Special Boat Service) and Australia (Special Air Service Regiment), Duggan interview and Beaudette interview.

## Assessment of Strategic Relevancy 1992-2001

According to retd DM Fowler Canada cannot be taken seriously as a G8 member, or possess a credible voice on the international stage, without a bona-fide hostage rescue (HR) capability. To lack a national HR capability is to cede national sovereignty and international respect (if ever there is a mass hostage-taking or terrorist ‘spectacular’ event on Canadian soil).<sup>96</sup> For a select few within DND’s senior leadership, JTF 2 is known as a national level asset with a very specific mandate, but interviews highlight awareness is lacking by others inside DND, and certainly by people external to DND.<sup>97</sup> It is also important to note here that contemporary Canadian SO capabilities encompass a wide and diverse range of highly unique offensive and defensive skills, tasks, missions and operational environments.<sup>98</sup> However in 1992, JTF 2 is formed with the intent to execute a very narrow slice of the SO spectrum, namely HR. Similar to Canada’s closest allies, the HR mission resides at the pinnacle of SO, the remit of so-called national mission units. Ergo, JTF 2 is a strategic resource because of this national mandate.

Returning to the inestimable value of the DCDS’s strategic oversight and visibility on the burgeoning capability, both General (Gen) Ray Henault (DCDS from 1998-2001) and VAdm Maddison (DCDS from 2001-2005) state they learn more about, and become more trusting of, the organization and its abilities because of the short C2 relationship. Specifically they note CANSOF’s ability to successfully operate in ambiguous situations while maintaining a low

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<sup>96</sup>Fowler interview. See also Robert R Fowler, *A Season in Hell*, 1st ed. (Toronto, ON: Harper Collins Publishers Ltd., 2011), 119.

<sup>97</sup>Pratt interview, Fowler interview, Wilczynski interview, John G. interview, Ferguson interview, Dumais interview, Gauthier interview, Horn interview, Baker interview, Stephenson interview, and Pugliese interview; and LCol Daniel Blanc, telephone interview with author, 16 December 2012.

<sup>98</sup>Bruce B. interview. For more information on contemporary CANSOF capabilities and missions see Canada, “CANSOFCOM,” National Defence and the Canadian Forces, <http://www.cansofcom-comfoscan.forces.gc.ca/index-eng.asp> (accessed 21 March 2013).

profile. These early operational successes lead to more important opportunities.<sup>99</sup> During the 1990s Canada deploys GPF to increasingly complex operational environments. To assist Canadian national commanders better understand their area of operations (AO) CANSOF deploys small teams.<sup>100</sup> These teams connect to the allied SOF network operating within the AO that GPF simply cannot access. Therefore, CANSOF provides another line of reporting for operations and intelligence as well as allied perspectives to the Canadian national commander and National Defence headquarters. Once connected, this network provides the second major opportunity. CANSOF personnel from the period recall that JTF 2 rapidly learns non-CT SOF tradecraft and starts to build its brand name as a junior member within the 4-Eyes international SOF community.<sup>101</sup> Further, as related by retd CDS Gen Walter Natynczyk, “During the 1990s Canada would not have been given the opportunity to command the NATO operation in Bosnia if Canada didn’t possess the national capability to deploy and conduct certain discrete operations unilaterally.”<sup>102</sup> Certainly within DND these select few senior leaders begin to better appreciate the strategic utility that this irregular capability offers to Canada.

The conclusions from the 1993-2001 time period in CANSOF’s history are telling. First, it is clear that the national leaders understand the security environment and its demands. As a result, a new unit for the conduct of in-extremis HR forms despite DND cutting capabilities

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<sup>99</sup>Henault interview and Maddison interview.

<sup>100</sup>Note: Official Government of Canada policy is not to comment on the potential or actual deployment or employment of CANSOF or to comment on any aspect of operations. Thus the majority of CANSOF activities are classified and merit very little public acknowledgement. The discretionary overseas employment of the force was envisioned as captured by the second line of its mission statement “its personnel can be employed in any type of military operations [sic], which include, but are not limited to, surveillance, security advice and close personal protection.”

<sup>101</sup>Rouleau interview, Duggan interview, and Bruce B. interview.

<sup>102</sup>Natynczyk interview.

elsewhere. Second, it is also clear that the military strategic level understands that a joint, SOF capability is worth the pennies it costs to “maintain a capability to assist in mounting, at all times, an immediate and effective response to terrorist incidents.”<sup>103</sup> CANSOF grows over the decade to roughly 350 personnel (growth of approximately 25 service personnel per annum) and to a budget of approximately \$10 million (Canadian dollars).

The bottom-line however, is also clear. Outside its HR mandate, JTF 2 provides limited strategic utility as CANSOF is finding its way and simply has too many operational gaps. Further, JTF 2 suffers from poor strategic visibility as it is largely an unknown entity except for a select few DND insiders. Therefore, in the end, although undoubtedly strategically important as JTF 2’s continued growth indicates, CANSOF has not yet achieved strategic relevancy as defined earlier.

#### CANSOF - Strategic Relevance: 2001-2012

Recommendation 11: The Department of National Defence undertake a study on the future of JTF2 to determine its long-term requirements in terms of resources, the implications of overseas deployments of some of its personnel, and the advantages and disadvantages of establishing a Canadian special force unit similar to U.S. and U.K. special force units operating in Afghanistan. The Department should communicate to this Committee the general conclusions of this study and its decisions, if any, concerning the need for a special force.<sup>104</sup>

—David Pratt, MP, “Facing our Responsibilities: The State of Readiness of the Canadian Forces”

Only nine months after 9/11, while CANSOF is just commencing its second six-month rotation in Afghanistan, the House of Commons’ Standing Committee on National Defence and Veterans Affairs (SCONDVA) has definitively taken notice of CANSOF’s strategic utility. The epigraph above is one of 25 recommendations from the May 2002 final report to Parliament,

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<sup>103</sup>Canada, *1994 White Paper on Defence*, 8.

<sup>104</sup>David Pratt, MP, “Facing our Responsibilities: The State of Readiness of the Canadian Forces,” Report of the Standing Committee on National Defence and Veterans Affairs (Ottawa, ON: House of Commons, May 2002), <http://www.parl.gc.ca/HousePublications/Publication.aspx?Language=E&Mode=1&Parl=37&Ses=1&DocId=1032107&File=0> (accessed 21 January 2013).

“Facing our Responsibilities: The State of Readiness of the Canadian Forces.” The key conclusion is the GoC understands its small, national SOF asset is potentially a useful, alternative strategic option. JTF 2 requires serious study to better assess its true strategic potential.

The rise in CANSOF’s profile is due to an appreciation within the GoC that SOF is also very cost-effective for a middle power such as Canada. The GoC is learning that relatively small investments in SOF grow the capability exponentially, producing national strategic benefits (e.g. expands military response options) that key allies such as the US value.<sup>105</sup> As a direct result from the improved awareness of SOF, CANSOF’s strategic utility is clearer to many strategic leaders. This clarity leads to further investments (i.e. people, equipment and structure) so by the end of its second decade, CANSOF possesses all the tangible elements that enable its strategic relevancy.

#### Structure 2001-2005

Examining the years 2001-2005 from an organizational structure and capability perspective is best achieved by demonstrating the fact that previous national capability gaps are closed. This approach is adopted because during the 2001-2005 timeframe CANSOF’s structure remains essentially the same and there is no change to the C2 relationship under the DCDS.

#### Capability Analysis 2001-2005

The overall state of the capability during 2001-2005 is best described as ‘limited but improving quickly’. The lack in both CT capacity and niche enabling functions requires an appreciation of strategic risk to be carefully weighted against potential strategic reward on a case-by-case basis. Due to an increase of asymmetrical security challenges (e.g. Canada hosts the G8 Summit in 2002) CANSOF is in high demand according to ret’d CDS Gen Henault and “We took the risks necessary to permit the unit to grow its offshore capability while preserving a credible

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<sup>105</sup>Pratt interview, Henault interview, and Maddison interview.

and capable HR response at home, paving the way for the transition to the SOF capability that is now firmly established within the CAF structure.” Therefore with the domestic HR mandate as the never fail mission it is always resourced first, hence the majority of any accepted risk shifts to the discretionary mission under consideration.

To ameliorate this unsatisfactory situation, visionary leaders engage on behalf of CANSOF. Concurrently at the strategic and tactical levels, studies, working groups and joint experimentation occur.<sup>106</sup> Together these endeavours identify deficiencies and reconfirm as well as help prioritize the bona-fide operational requirements. This rigour of analysis provides decision-quality information to the senior leadership, who can quickly make informed decisions to address priority gaps. For CANSOF, the force development process that previously took years is significantly reduced to the point where an issue can be identified, a solution conceived, and delivered within the same fiscal year. As a result of the funding increases, full GPF and interagency support to CT exercises, and an overall rise in strategic visibility, by late 2005 CANSOF bridges the majority of the domestically focused capability gaps and interoperability challenges.<sup>107</sup> Furthermore, CT enabler capacity and C2 has matured to the point where tactical and strategic risk/reward calculations are less stark than previously.<sup>108</sup> This allows more robust and task-tailored CANSOF elements to deploy, which again increases GoC option space.<sup>109</sup>

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<sup>106</sup>At JTF 2 these ‘War Cabinets’ occur frequently to update the unit leadership, confirm the current state of CANSOF affairs, and to debate next steps. Baker interview.

<sup>107</sup>In December 2001 the GoC announces \$120 million (CAD) in direct funding to double the size of JTF 2. Most uninformed ‘experts’ assume this means a doubling of personnel strength. The reality means an increase in the overall capability and capacity of JTF 2 to deliver certain SOF effects on behalf of Canadians. For SOF effects, sometimes ‘less is more’ if the appropriate enabling functions are in place (e.g. global reach within the C4ISR domain).

<sup>108</sup>Day interview; Bruce B. interview; and MGen Nicholas Matern, telephone interview with author, 14 December 2012.

<sup>109</sup>Henault interview, Maddison interview, and Matern interview.

The sum of this effort, in concert with other academic initiatives, provides the intellectual rigour and solid analytical foundation that eventually develops the broad outline for a twenty-first century SOF capability for Canada.<sup>110</sup> With this analysis in hand a new transformative CDS is enabled as he presses forward within his vision for a renewal and reinvestment across the CAF.<sup>111</sup> Upon promotion to CDS in 2005 Gen (ret'd) Rick Hillier foresees, "The Forces will become more effective by better integrating maritime, land, air and special operations forces. The overall goal will be 'focused effects': the ability to deploy the right mix of forces to the right place, at the right time, producing the right result." It is improbable his vision for CANSOF takes root without the national strategic momentum produced by the tactical successes and national prestige gained through the OEF deployment of 2001-02.<sup>112</sup> This irreversible momentum benefits CANSOF's strategic visibility as it translates down and across the GoC, building as it leads to 2006.

Notwithstanding the capability improvements though, CANSOF still suffers from gaps for expeditionary operations. Even with the attention and infusion of resources that undoubtedly enables the tactical leaders and individual operators of JTF 2, the capability as a whole remains deficient in three vital enabling areas. First, SOF-specific headquarters and staffing capacity remains insufficient to affect proper C2 at the operational and strategic levels. Second, force

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<sup>110</sup>Rouleau interview, Matern interview, and Baker interview. For an example of the academic work see LCol Jamie Hammond, "Special Operations Forces: Relevant, Ready and Precise," *Canadian Military Journal* 5, no.3 (Autumn 2004). <http://www.journal.forces.gc.ca/vo5/no3/special-01-eng.asp> (accessed 6 January 2013).

<sup>111</sup>Stein and Lang, 160.

<sup>112</sup>Former DM Fowler provides this observation on the institutional reluctance for SOF, "In the aftermath of the torture-murder of Shidane Arone and it's handling within essentially 'The Army,' it is fair to say that outside DND and the CF, Airborne or, indeed, 'Special' forces were not the flavor of the month for some years. Inside the defence establishment, very much including the Army, the situation was little different. I would contend that... "Big Green Army" have always been the most vociferous opponents of Canada's developing an effective SOF capability. The Airborne Regiment's disgrace gave them a lot of ammunition to keep the concept contained, particularly as the politicians, who had been badly shaken up by the Somalia fiasco, could be counted on to support Army-think."

projection remains problematic. Lastly, JTF 2 lacks fully interoperable SOF sister units to share some of the load (e.g. to facilitate the maintenance of technological over-match).

Of all three, the author posits the C2 deficiency is the most pressing. The challenge is no longer in the tactical/operations domain as it is pre-9/11 due to the lessons learned from the OEF experience and the subsequent effort to rapidly incorporate new standard operating procedures. Instead there is a lack of knowledgeable and experienced SOF staff capable of working at the operational and strategic levels. The lack of SOF staff capacity in two critical enabling areas exacerbates the other operations challenges.<sup>113</sup> First, CANSOF lacks the ability for sustained and effective combined, joint, whole-of-government, and theatre-level engagement. Second, an ability for true force development exists (i.e. beyond simple equipment purchase and replacement to the procedural elements of conceiving, designing, fielding and sustaining capability packages). Retd DCDS VAdm Maddison describes the challenges:

. . . both Gen Henault and I were aware of and pushed for the continuing evolution of SOF including the refinement of strategic C2 for SOF. We were insistent that deployed SOF Commanders reported directly to the DCDS on operations as we could not fail at the embryonic stages of deploying SOF....We were aware that eventually C2 would evolve as it did in Gen Hillier's time but we all needed the time and experience at the outset to achieve the maturity where C2 could indeed safely and effectively evolve to the model we have today. In hindsight, it was the right approach and all of us succeeded as a result from the tactical through to the strategic.<sup>114</sup>

The lack of a published National Counter-Terrorism strategy/plan and an unresolved dialogue surrounding special operations aviation (SO Avn) deficiencies are but two specific examples of this lack in staffing ability at the higher operational and strategic levels.<sup>115</sup>

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<sup>113</sup>Baker interview.

<sup>114</sup>VAdm (retd) Greg Maddison, e-mail correspondence with author, 24 March 2013.

<sup>115</sup>Despite ongoing dialogue since the 9/11, Canada's National Counter-Terrorism strategy is just released in 2011 due to the persistent engagement of CANSOF staff officers to this file. Prior to CANSOFCOM, the dedicated 3-ship helicopter package (that is assigned for a 100-man JTF 2 in 1992) remains unchanged despite JTF 2 now having multiple sabre squadrons, an expanded task-set, as well as operating in more diverse and complex operational environments.

Although less pressing than C2, the gaps in the other two vital enabling areas are still detractors to the overall capability. The first is SOF mobility. CANSOF either lacks the platform outright, or possesses an insufficient quantity of SOF interoperable mobility assets (air, aviation, ground, water). This is most pressing for expeditionary missions. Next, the lack of SOF sister unit(s) mean time and effort is expended within JTF 2 ensuring key enabling functions are developed, trained and operationally viable and ready. This ensures a tactically essential and seamless integration of tactical combat power on the objective for the operator. However, this enormous effort significantly detracts from consolidating lessons learned, or staffing and advancing other leading-edge concepts in use by Canada's closest allies. In sum, CANSOF simply does not have the maturity or depth in people, processes and structure to simultaneously deliver equally capable domestic and expeditionary force packages.<sup>116</sup> Therefore, the only reasonable conclusion is CANSOF lacks the depth to truly expand military strategic options.

#### Assessment of Strategic Relevancy 2001-2005

Undoubtedly 9/11 increases CANSOF's public profile just like many other national security agencies such as the Canadian Security Intelligence Service. Therefore the conversation around strategic relevance at this point is a difficult one. For example, according to the first OEF CANSOF Task Force Commander, Col (ret'd) Mike Beaudette, "we arrived as unknowns in Afghanistan, but by the end of our tour, not only were we the CJSOTF [Combined Joint Special Operations Task Force] Commander's direct action task force of choice, we were routinely commanding US and other coalition special operations forces." The CANSOF Task Force also earns the US Presidential Unit Citation (Navy) for its excellence in combat.<sup>117</sup> Further, lasting

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<sup>116</sup>Day interview, Matern interview, Russell interview, Beaudette interview, Blanc interview, and Baker interview.

<sup>117</sup>Beaudette interview, Anderson interview, and Bruce B. interview.

impressions of CANSOF's strategic value to allies is highlighted by two other events. First in the lead up to the 2003 Iraq invasion, US Central Command assigns CANSOF its own AO amongst a select group of international SOF partners. Until the Canadian Prime Minister announces in Parliament just two days prior to the war's air campaign, that Canada will not participate in the campaign in any fashion taking many by surprise.<sup>118</sup> Second, in 2004 the US Government sends a démarche to Ottawa specifically requesting JTF 2 deploy to Afghanistan for a second one-year commitment.<sup>119</sup> The GoC obliges relatively quickly to the US request for forces and CANSOF deploys for a second one-year commitment in the summer of 2005.<sup>120</sup> VAdm (ret'd) Maddison sums up the 2001-2005 period best, "I cannot agree more than what Gen Henault has replied to you - I believe the 2001-2005 experience had significant impact on both the visibility of JTF 2 and subsequently SOF on our political authorities . . . the success of JTF 2 in those years clearly paved the way for the structure and capabilities we have today."

Notwithstanding four years of CANSOF progress, the author assesses the CANSOF capability remains just short of true maturity and therefore is not truly strategically relevant yet. The following vignette provides a CANSOF operations example from Afghanistan in support.

"Ops Sergeant-Major, it's the Deputy Commander. The CJSOTF Commander and I are briefing the Theatre Commander in 15 minutes. What do you have for an update?" "Sir, the situation is very fluid and we just do not know. Comms are intermittent and we

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<sup>118</sup>Stein and Lang, 73-77.

<sup>119</sup>Matern interview, Blanc interview, and Baker interview.

<sup>120</sup>Although primary sources are lacking, it is inferred elsewhere that tensions existed between Ottawa and Washington at the time. Officials struggle to find common ground on a number of challenging Canadian-US files (e.g. ballistic missile defence, softwood lumber agreement, and mad-cow disease among others). This is causing friction between the two governments. The implied line of reasoning that JTF 2 is a useful strategic concession cannot be confirmed but it is highly plausible. What is beyond a doubt is that Canada-US relations were strained from 2003-2005 because of a number of contentious issues between the two governments as related by Stein and Lang in *The Unexpected War*, 160-177 and 188-187. Interestingly, as senior government officials confirm, the request for JTF 2 to re-deploy came in through DND vice the normal route through the Department of Foreign Affairs and International Trade.

cannot properly support the fight from here because we can't speak with the other coalition forces in the area. The boys have the situation finally under control but sniping continues, we believe there may have been up to three high-value targets, their personal security details and other fighters gathered for a significant meeting of some sort. I can confirm that our casualties are still forward at the coalition aid station; they are working hard to stabilize them. The worst guy has had over 29 litres of blood pumped directly into him, and it does not look good. The helo that overshot the objective, had doubled-back and that was when it was hit with multiple RPGs. It is burned-up on the ground. The other birds have all returned to base with significant damage." "Got it, I'll call you back with the General's thoughts on the way forward. I have to tell you that this has turned into a highly 'emotional event' for all. Our mission has become the theatre main effort. Our allies don't like having their helo's shot up let alone having one downed." "Sir, do they realize we are in the middle of a war and things occasionally go sideways?" "Yes of course they do. My assessment is that something else is afoot, this is much bigger than you or I can imagine. It is clear to me that our allies believe we are completely at fault. They think we have major problems, such as a misemployment of aviation assets, and an inability to C<sup>2</sup> operations! Let the Boss know."<sup>121</sup>

#### Structure 2006-2011

For the last period under study perhaps the best indication of early GoC thinking about expanding CANSOF comes from the November 2001 SCONDVA interim report, "State of Readiness of the Canadian Forces: Response to the Terrorist Threat," Interim Report of the Standing Committee on National Defence and Veteran Affairs. Within this report the following recommendation is made for JTF 2 enhancement:

This would allow JTF2 to increase its ability to deal with incidents within Canada while increasing its capacity to be deployed overseas and contribute to international efforts to blunt the ability of terrorists to carry out attacks. In the long run, JTF2 could also serve as the basis for a special operations force which could broaden the ability of the Canadian Forces to contribute to national and international security.<sup>122</sup>

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<sup>121</sup>The author was posted to JTF 2 as a captain in 2001 and remained within the CANSOF fold for the next 10 years leaving as the Commanding Officer in 2011. The vignette is based on real-life events during the author's Afghanistan deployment as the CANSOF Task Force Deputy Commander and liaison officer to CJSOTF-A in 2005. There is a period during the 2005-06 Afghanistan deployment when the theatre HQ questions CANSOF's ability to C<sup>2</sup> operations (due to numerous C4ISR challenges). The deficiencies are rectified and CANSOF's reputation is not only restored but also greatly enhanced because of the improved C4ISR architecture.

<sup>122</sup>Pratt, "State of Readiness of the Canadian Forces: Response to the Terrorist Threat," 13-14.

Less than five years later, in February 2006, CANSOFCOM is formed. The new command is led by a brigadier general vested with the equivalent authorities, responsibilities and accountabilities for all Service specific force development and force generation; similar to the regular force Service Chiefs. The Commander reports directly to the CDS and has direct access to the DM as well as other key institutional actors within DND.<sup>123</sup> CANSOFCOM consists of an operational/strategic level headquarters of approximately 100 staff officers and other specialists. Along with JTF 2, a new US Ranger Regiment-like sister unit (the Canadian Special Operations Regiment (CSOR)) is created, an expanded SO Avn capability is formed (427 Special Operations Aviation Squadron (427 SOAS)), and finally a Chemical, Biological, Radiological, Nuclear, Explosive (CBRNE) mitigation unit known today as the Canadian Joint Incidence Response Unit (CJIRU) is established. This grouping of JTF 2 and all SO enablers under one unified, joint commander gives Canada a twenty-first century SOF capability. This is the penultimate step in establishing CANSOF's strategic relevance. The formation simply must organizationally mature to prove its value to the institutional skeptics, of which there will always remain a few.<sup>124</sup>

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<sup>123</sup>Day interview and BGen Denis Thompson, telephone interview with author, 21 December 2012.

<sup>124</sup>Natynczyk interview. Gen (retd) Natynczyk recalls that he had to personally engage to ensure CANSOFCOM was not subsumed within one of the traditional services during the 2011 study on CAF re-organization. Historically, this GPF-SOF friction is worse than what we experience today. Typical examples of senior military commander's views on irregular forces are seen with comments made by two great WWII generals. The famous Canadian LGen AGL McNaughton on 19 August 1941 states: "I have watched with interest the organization here of such special units as Commandos, Ski Battalions and Paratroops. The cycle is always the same – initial enthusiasm, which is very high, drawing good officers and men from regular units, distracting and unsettling others, and upsetting units' organization. With a prolonged period spent in awaiting employment, the enthusiasm evaporates...In consequence I do not advocate the establishment of any separate Paratroops in the Canadian Forces," Horn, *Bastard Sons*, 25. Field Marshal Viscount Slim's perspective on the necessity or not of irregular forces: "The level of initiative, individual training, and weapon skill required in, say, a commando, is admirable; what is not admirable is that it should be confined to a few small units. Any well-trained infantry battalion should be able to do what a commando can do..." Field Marshal Viscount Slim, *Defeat into Victory* (London, UK: Macmillan Publishers Limited, 1987), 546-547.

To definitively prove the origins of today's CANSOFCOM grow from the 2001-2002 OEF commitment, one needs access to the classified documents that have yet to be declassified. What can be disclosed is that there exist numerous CANSOF after-action reports, post-operations analyses, and studies completed over the years prior to 2005. Contained within, one finds recommendations speaking to the need for some form of 'special operations group' as articulated in the 2005 defence policy statement *A Role of Pride and Influence in the World*.<sup>125</sup> This recommended SOF organization is capable of SOF specific force development and force generation. In exceptional circumstances, it is also capable of strategic and operational level C2 for prosecuting nationally sensitive, strategic operations and missions on behalf of the GoC.<sup>126</sup>

#### Capability 2006-2012

As a result of the formation of CANSOFCOM the major capability gaps that exist prior to 2006 are largely bridged. Grouped under one joint commander with JTF 2 at the core, CANSOFCOM has the requisite staff capacity enabling appropriate C2 and oversight, an adequate SO Avn Squadron under command, maturing CJIRU and CSOR sister units and lately a small but effective SOF training organization.<sup>127</sup> Operationally, CANSOF is globally responsive, although the domestic CT mission remains the first priority. CANSOF is fully interoperable at the tactical level and is trusted within the 4-Eyes international SOF community.<sup>128</sup> For the author the

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<sup>125</sup>Canada, *Canada's International Policy Statement: A Role of Pride and Influence in the World*, DEFENCE (Ottawa, ON: Department of National Defence, 2005), [http://www.forces.gc.ca/admpol/downloads/Canada\\_Defence\\_2005.pdf](http://www.forces.gc.ca/admpol/downloads/Canada_Defence_2005.pdf) (accessed 27 November 2012), 18-19.

<sup>126</sup>The author was party to many of the discussions and has intimate knowledge of the various documents, which led to the development of CANSOFCOM. MGen Day, Col (retd) Russell, Col (retd) Beaudette and Col Mike Rouleau were key actors in the overall process.

<sup>127</sup>Thompson interview.

<sup>128</sup>Bruce B. interview. For more information see Canada, "CANSOFCOM," National Defence and the Canadian Forces, <http://www.cansofcom-comfoscan.forces.gc.ca/index-eng.asp> (accessed 21 March 2013).

key indicator of the overall capability maturity and viability is the achievement of an excellent tactical balance between the domestic and international operational outputs. CANSOF can provide equal task-tailored special operations task forces where required. Thus it provides increased strategic flexibility and improved military strategic options to the GoC. CANSOF can concurrently C2 and force project the national HR response, a CBRNE line of response and an expeditionary special operations task force (SOTF) 24/7 and 365 days a year. The gaps of the 1990s and the early 2000s are bridged, albeit the current construct does have some limitations.<sup>129</sup>

#### Assessment of Strategic Relevancy 2006 - 2012

According to former MND, The Honourable David Pratt, P.C., CANSOFCOM today has progressed to the point where, “it has evolved from a small and exotic tool in the Canadian Forces order of battle to an important instrument in the application of force and the exercise of statecraft.”<sup>130</sup> Retd CDS Gen Henault shares a similar sentiment stating:

During my time as the Chairman of the NATO Military Committee, from 2005 to 2008, it was clearly recognized by the NATO military and political leadership that Special Ops forces had much to contribute to operations like those occurring in Afghanistan, and significant efforts were expended to "harmonize" the overall capabilities of the various Special Ops communities . . . This evolution within our key strategic Alliance likely had an important role in influencing Government to accept a higher-order place for SOF within the Canadian military structure.<sup>131</sup>

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<sup>129</sup>Note: Official Government of Canada policy is not to comment on the potential or actual deployment or employment of CANSOF or to comment on any aspect of operations details. A very good example of this is the lack of substantive mention of CANSOF's accomplishments in the highly anticipated, blue-ribbon, non-partisan 2008 government report recommending Canada's options for continuing the Afghan mission. See The Honourable John Manley, P.C., Derek H. Burney, O.C., The Honourable Jake Epp, P.C. The Honourable Paul Tellier, P.C., Pamela Wallin, O.C., “Independent Panel on Canada's Future Role in Afghanistan,” Ottawa:ON Her Majesty the Queen in Right of Canada, represented by the Minister of Public Works and Government Services, 2008, 20-23.

<sup>130</sup>Pratt interview.

<sup>131</sup>Gen (ret'd) Ray Henault, e-mail correspondence with author, 23 March 2013.

For many, including recent Commanders, CANSOFCOM is trusted at the highest levels of government.<sup>132</sup> So much that the Prime Minister's office invited CANSOF to come out of the shadows in 2012 and demonstrate Canadian sovereignty over the Arctic. For the first time on record, a maritime CT capability demonstration is held for the national media.<sup>133</sup>

Institutional legitimization continues as evidenced with the release of two internal DND reports on the CAF's post-2006 transformation. The 2007 and 2011 reports each assess the CAF's structure and performance making recommendations for further consideration. Key to CANSOF, is the consistency from one study to the next indicating CANSOFCOM in the current construct is a valuable addition to the defence arsenal. From multiple institutional perspectives it is clear: CANSOF profits from an increased visibility and understanding of its strategic utility. This when coupled with strong political support makes CANSOF strategically relevant as a unique element of national military power.<sup>134</sup>

#### Summary of CANSOF Findings

There is no question that JTF 2 is both relevant and important during the 1990s. CANSOF cannot sustain the steady resource increases it receives if this is not the case, especially in light of the defence reductions occurring everywhere else. The perspective on strategic relevance advanced herein is one centred on a wider acknowledgement of CANSOF's strategic value and utility. Through this lens and prior to 9/11, CANSOF has no real caché, nor is there a

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<sup>132</sup>Day interview and Thompson interview.

<sup>133</sup>Pugliese interview.

<sup>134</sup>Hillier, 368-369. R. R. Crabbe, L. G Mason, and F. R Sutherland, "A Report on the Validation of the Transformed Canadian Forces Command Structure" (Ottawa, ON: Report Prepared for the Chief of Defence Staff, 31 January 2007), 52. LGen (ret'd) Leslie's Report on Transformation 2011 makes multiple recommendations for improving the CAF. However, one of the most telling is the statement that CANSOFCOM and its 2006 command and control relationship should remain unchanged (i.e. a direct reporting entity to the CDS).

wide appreciation of what it can do on behalf of Canadians. If considered during strategic deliberations, JTF 2 is considered within a very narrow and limited construct only.<sup>135</sup>

The tactical and strategic successes of the 2001-02 OEF deployment raises the national profile of SOF. This makes various national leaders aware there are non-GPF military options available to them that are both valued by key allies and relatively low risk politically and militarily. The success of the 2001-02 CANSOF Task Force sets in motion a series of events that transforms the brand to such an extent that today CANSOF regularly interfaces with all the key national security actors and is a key partner in the international SOF community. There is an open and frank dialogue between equal and respected partners whether operating together in the field, or through a persistent engagement on exercises, exchanges and at regular meetings. Prior to 9/11 this is simply not the case.

Evidence strongly supports the idea that the years 2001-2005 see a significant growth in the strategic profile and utility of SOF by various stakeholders. Without a doubt JTF 2 is a brand that resonates as a vital, national resource; however, from a structure and capability perspective CANSOF still lacks some of the vital enablers and institutional mechanisms of a truly mature and distinct capability in comparison to the larger GPF. These gaps only allow for incremental capability improvements, preventing the revolutionary leaps of our 4-Eyes allies. Despite best efforts to keep pace with them (e.g. by addressing some of its capability gaps such as integral land-based mobility), CANSOF simply does not have the ability, capacity nor the weight of a strategically relevant organization. Thus, CANSOF begins to lose a step in competition with those SOF allies who are actively engaged in the 'battle-labs' known as Iraq and Afghanistan.

Although a few CAF strategic leaders and many within CANSOF community understand what is in the art of the possible, it takes a new CDS, Gen (ret'd) Rick Hillier, to provide the

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<sup>135</sup>Pratt interview, Fowler interview, Wilczynski interview, John G. interview, and Pugliese interview.

vision, will and force of personality to bring CANSOF to the next level. It should be sufficient evidence that Gen Hillier characterizes CANSOF as a ‘fourth service’ (that is repeated and sustained by his successor Gen Walter Natynczyk) to confidently proclaim that CANSOF is strategically relevant. However, there are dissenting voices with valid perspectives on this fourth service view.<sup>136</sup> Notwithstanding some of the semantics surrounding the definition of a Service, it is nearly unanimously believed that CANSOF is certainly “unique” and “very different” when compared with GPF.<sup>137</sup> Nevertheless, according to the second CANSOFCOM Commander, Major General (MGen) D. Michael Day (2007-2011), whether or not CANSOF is or is not the fourth service is immaterial. From his perspective, also shared by the current Commander Brigadier General (BGen) Denis Thompson, CANSOFCOM benefits from many of the same formal indicators (such as similar authorities, responsibilities, and accountabilities) as the Service Chiefs as already discussed. Further, CANSOF also possesses the informal trappings of a distinct service (e.g. tan beret, new place of prominence at national remembrance celebrations) as well as a seat at the table alongside the other Services for various departmental meetings and committees. Therefore, the fourth service debate is nothing but a distraction.

The core of the issue according to a variety of experts is the operational reality that “CANSOF has arrived” and is one of only a select few agencies that engenders wide support and

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<sup>136</sup> For example CANSOFCOM is not represented at Armed Forces Council, “The Armed Forces Council is the senior military body of the Canadian Forces. It meets regularly to advise the Chief of the Defence Staff on broad military matters pertaining to the command, control, and administration of the Canadian Forces and to help the CDS make decisions. The Armed Forces Council is chaired by the CDS, generally meets at least once per month, and includes the Vice Chief of the Defence Staff, the Deputy Chief of the Defence Staff, the Environmental Chiefs of Staff, and other senior military advisors.” For more information see: <http://www.forces.gc.ca/site/ocds-bcemd/afc-cfa/index-eng.asp> (accessed 14 April 2013).

<sup>137</sup> Maddison interview, Dumais interview, Baker interview, Duggan interview, and Pugliese interview.

trust across all levels of government.<sup>138</sup> Unlike the 1990s and early 2000s, today there exists a level of trust, credibility and general awareness of CANSOF and its value and utility from the most senior levels of government. Colloquially ‘around the town’, the various power circles of Canada’s capital know CANSOF as a brand unto itself. Nevertheless, the author holds there is another telling aspect. CANSOF is both institutionally legitimate and it enjoys a level of trust, credibility, and awareness that transcends the internal frictions of DND. If not handled adroitly by the CANSOF leadership this could become a liability. As strategic visibility is a double-edged sword during difficult budgetary times, and strategic relevance is very much a subjective appreciation.

#### COUNTER-ARGUMENT

CANSOFCOM personnel see themselves as quiet, mature professionals doing an important service for Canadians. But not everyone shares that view. Many times, I have received a different view from serving military personnel about CANSOF . . . Some parliamentarians have a similar perspective . . . these types of concerns are now being voiced in the House of Commons and in media articles . . .<sup>139</sup>

—David Pugliese, “Reflections of a Journalist”

Although, as the saying goes, it is impossible to prove a negative, this section briefly rebuts a common viewpoint that regardless (within reason) of JTF 2’s performance during the 2001-2002 deployment that CANSOF’s future is set. To start one must understand there is a very large difference between tactical excellence and strategic relevance. There is also a significant difference between being spoken of as a national level asset vice being seen to be a fourth service.

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<sup>138</sup>John G. interview, Natynczyk interview, Day interview, Thompson interview, Blanc interview, Pugliese interview, and Stephenson interview.

<sup>139</sup>David Pugliese, “Reflections of a Journalist,” In *Special Operations Forces: A National Capability* (Kingston, ON: Canadian Defence Academy Press, 2009), 202.

Therefore granted the metric on strategic relevance is subjective, interviews all prove that CANSOFCOM in its current construct is a valued instrument in the defence toolbox.

The logic in rebutting the notion that CANSOF's future is certain is traced through key GoC documents and announcements. First, there is no doubt that an expansion of JTF 2 will occur as announced in December 2001, concurrent to CANSOF's first deployment to Afghanistan. However, as is often experienced with other Canadian defence initiatives (e.g. the "*Canada First*" *Defence Strategy*), it is relatively easy to publish policy. It is something completely different for policy announcements in turn to deliver hard military power.<sup>140</sup>

Next, the Canadian political climate of the first decade of the twenty-first century can change dramatically, and without warning insofar as defence matters (e.g. Canada's decision to not participate on US ballistic missile defence, after publically endorsing the idea).<sup>141</sup> Also according to former DM Fowler, the Canadian experience with 'elites' and other irregular organizations, to be charitable, is very checkered.<sup>142</sup>

Therefore, it is not inconceivable that had JTF 2 failed - either tactically or by not delivering such a disproportionately positive effect for Canada - that the early momentum may have dissipated. This possibility results in Canada possessing the 2005 version of CANSOF, a super-empowered tactical unit. But as has been demonstrated herein, anything short of the current CANSOFCOM construct (i.e. one lacking a unified, joint C2 construct and all the integral critical

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<sup>140</sup>Bland, 111-117.

<sup>141</sup>Stein and Lang, Ch. 9.

<sup>142</sup>When describing how a former CDS saw elites within the CAF former DM Bob Fowler states, "he hated the whole idea of "special" forces. All soldiers were special, he insisted." Fowler, e-mail correspondence with author, 21 March 2013. See also Horn, *Bastard Sons* to better understand his explanation for the underlying reasons for problems that lead to the disbanding of the disgraced Canadian Airborne Regiment.

elements) means that CANSOF is not enabled as a relatively self-sufficient, globally capable, unique instrument of Canadian military power and thus is not strategically relevant today.

Finally, without the trust, credibility, and international respect that CANSOF gains over that one-year deployment, it is highly unlikely that Gen Hillier's vision for CANSOF can effectively take root at both the political and institutional levels. This position is put forward from the perspective that if the wider defence, security and political institution does not see value in the growth of SOF, then the conservative minded, institutional inertia inherent in all military organizations most likely cannot be overcome. Not to take away from Gen Hillier's force of personality, but as is seen with his failed vision for a "big honking ship" (to support CAF operations in the littorals) without wide-spread political, extra-departmental and institutional legitimization, "the omens are not good" as Ottawa can be a graveyard for grand ideas.<sup>143</sup>

In conclusion, lacking in strategic relevance means political, pan-governmental and institutional support can rapidly wane. Gen Hillier admits as much when another of his creative ideas failed because, "Nobody in Ottawa was interested, so the idea died."<sup>144</sup> Therefore it is not a stretch to see how new visionary ideas can become stale and yesterday's story. In the Canadian context, a waning broad support base results in an increase in bureaucratic inertia, an inertia that is pre-disposed to the "maintenance of the status quo."<sup>145</sup>

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<sup>143</sup>Hillier, 343. Bland, 286, states "When there is no consensus between ministers, officials, and officers about the situation, objectives and the resources needed for national defence, the usual outcome is confusion and confusion might be the chief characteristic of Canadian defence policy today."

<sup>144</sup>Hillier, 343.

<sup>145</sup>Bland, 1.

## FINDINGS AND RECOMMENDATIONS

The evidence put forth herein rebuts the alternative narratives outright. Analysis supports the new narrative that the 2001-02 OEF deployment is the seminal event that transforms CANSOF from being a strategic resource (i.e. JTF 2) to becoming strategically relevant (i.e. a distinct element of national military power). The research determines there are many supporting factors to this capability transformation but three key conditions do stand above the rest.

Condition 1: Since 1964 Canadian defence policy repeatedly states the requirement for the CAF to have an irregular capability to prosecute operations in asymmetrical environments. The analysis points to two further sub-findings that when combined with this extant policy fully enables CANSOF's propensity for growth. First, the pre-9/11 conception of national security is different from the post-9/11 notion. Interviews and historical trend lines indicate the national security paradigm did in fact shift, but only insofar as formally clarifying and codifying what officials are already practicing. The key deduction is a trend line is clear, indicating a growing GoC appreciation over time of the emerging threats to national security and it is the direct link between the two paradigms. The conclusion is 9/11 and subsequent events provide a strategic wake-up and the realization that national defence and internal security are not mutually exclusive, but have a symbiotic relationship. This conclusion runs counter to the uninformed view that a dramatic, eye-opening revelation occurred on the morning of 12 September 2001.

Condition 2: There must be clear, unambiguous direction from the GoC to DND as to the operational outputs expected of the CAF. In general, the pre-9/11 defence policies provide concise guidance to DND insofar as conventional platforms (types and numbers) for use confronting the primary (Soviet) threat in an offshore symmetrical environment. However, none of the policies articulate with any clarity the CAF's operational outputs for its secondary or asymmetrical problem-set. As such, DND/CAF focuses on the primary mission to confront an

external conventional (i.e. traditional military force-on-force) foe.<sup>146</sup> Although its secondary, in-extremist task to provide support to other provincial or federal agencies for internal security challenges (e.g. non-state actors and disturbances of the peace) is understood, they are not resourced with the requisite optimized (i.e. irregular) forces.

Post-1989, as the world experiences a more asymmetrical security environment, that is to say a preponderance of intra-state conflict involving violent, ideologically driven, non-state actors. However the national threat appreciation is very slow to adapt or adjust. Thus, defence policy (and hence the CAF) remains anchored in the status quo belief in the utility of versatile GPF, leaving the new CANSOF niche capability to find its way relatively unencumbered.<sup>147</sup>

Post-9/11, building upon the capstone 2004 NSP is a bi-partisan continuity and clarity within the defence policy statements of 2005 and 2008. The changes from pre-9/11 policy edicts, vis-à-vis the specificity of GoC direction to the CAF, highlight the new, strategic visibility of irregular forces. This specificity from the political level, supported by the bureaucracy, enables retd CDS Gen Rick Hillier to transform the CAF and create CANSOFCOM.

Condition 3: There must be non-elected leaders with the professional competence, personal courage, and foresight to ‘see the world as it is, not as we wish it to be’. CANSOFCOM today owes its existence and stature to three distinct groups of professionals who share two essential characteristics. By nature, they are not risk adverse and they ‘never waste a crisis’. These three groups operate at the military strategic level, the high tactical level, and the low tactical level.

The first group is those strategic leaders who understand the complexities of the emerging security environment and act: retd DM Robert Fowler, retd CDSs Gen Ray Henault and

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<sup>146</sup>Canada, *Challenge and Commitment*, 10.

<sup>147</sup>Bland, 282.

Gen Rick Hillier and retd DCDS VAdm Greg Maddison. Any of these four strategic actors could have adversely influenced CANSOF's future as they occupied crucial posts during its evolution.

The first of the group is Mr. Bob Fowler. A visionary public servant, for years he understood that mass hostage rescue operations (HRO) are beyond the capabilities of most (Canadian) police forces, as seen in Munich during the 1972 Olympics. To successfully conduct HRO requires specially trained military forces, as the successful 1980 Special Air Service Regiment assault at Princess Gate in London proves. The research supports the contention he plays a significant role behind the scenes in the transfer of the domestic CT mandate from the RCMP to DND. Without his overt support and involvement, the departmental transfer certainly does not occur as early as it does. This early transfer is crucial because those first nine years are absolutely critical in allowing a young CANSOF to trial, test, and validate itself while gaining the trust and confidence of key senior officers; before the crisis (i.e. 9/11) occurred.<sup>148</sup>

The next two key actors are Air Force Gen Ray Henault and Navy VAdm Greg Maddison, respectively the CDS and DCDS from summer 2001 until spring 2005. Lacking specific guidance from their civilian masters in the immediate aftermath of 9/11, both men know CANSOF intimately. These two conventionally groomed, insightful strategic leaders intuitively understand the strategic shock to the existing Canadian security paradigm. They put their faith in an 'untested' CANSOF Task Force from JTF 2, and 40 men seize the opportunity and deliver a strategic effect completely disproportionate to their humble size. The actions of these 40 men, coupled with numerous staff efforts over the subsequent four years, set in motion a series of institutional initiatives that allow Gen Henault and VAdm Maddison to set the strategic conditions that ultimately enable the final strategic actor.

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<sup>148</sup>There are five SOF truths, one of which is competent SOF cannot be created after the crisis occurs. See CANSOFCOM website for others.

As the late Samuel P. Huntington famously describes the average military mind in his renowned 1959 tome *The Soldier and the State*:

Consequently, the military man favors maintaining the broadest possible variety of weapons and forces provided that each weapons system is kept sufficiently strong . . . In reality, of course, he tends to stress those military needs and forces with which he is particularly familiar. To the extent that he acts in this manner he becomes a spokesman for a particular service or branch interest rather for the military viewpoint as a whole.<sup>149</sup>

Canada, it is argued, is blessed with an abundance of this kind of ‘service-centric’ versus ‘joint’ military mind but that is for another monograph. Nonetheless, in stark contrast to Samuel Huntington’s average military mind, Gen Rick Hillier is a once in a lifetime transformative leader. Huntington would most likely describe him as, “The ideal military man is thus conservative in strategy, but open-minded and progressive with respect to new weapons and new tactical forms.”<sup>150</sup> While generations of senior Canadian officers, generals and admirals arguably possess average military minds, Gen Hillier, and to a different extent Gen Henault and VAdm Maddison, are the embodiment of the latter. Central to his transformative vision are two key constructs. A new command and control model for the CAF that empowers joint operational commanders to successfully operate with the required joint forces. Second, he establishes ‘a special operations group’, a new irregular force of national military power.<sup>151</sup> The special operations group is the vital structural element that finally enables CANSOF to come of age and become truly strategically relevant.

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<sup>149</sup>Samuel Huntington, *The Soldier and the State* (Cambridge, MA: The Belknap Press of Harvard University Press, 1959), 67.

<sup>150</sup>*Ibid.*, 71.

<sup>151</sup>Gen Hillier tells the story in his book *A Soldier First: Bullets, Bureaucrats & the Politics of War*. He insists that he would not accept the promotion and appointment to become the CDS unless he has the full support of the Prime Minister and the resources and authority necessary to affect his vision to transform the CAF. Stein and Lang corroborate this contention in their book *The Unexpected War*, 155-159.

The next group is composed of two army officers who are instrumental in seizing opportunities and never hesitate to believe and trust in their subordinates: Col (ret'd) Clyde Russell and MGen Mike Day. Prior to 9/11 these two infantry officers spend the majority of their careers outside JTF 2. However post-9/11, as lieutenant colonels and colonels during the 2001-2005 timeframe, their stewardship and vision comfort the senior DND leadership that CANSOF is headed in the right direction. Without their collective wisdom (e.g. to expand JTF 2's mission sets and willingness to adjust CANSOF culture along the way), CANSOF remains anchored in the past as a very good, one-trick (Hostage-Rescue) pony. If they hesitate or appear unsure at any step along that four-year journey, and specifically during the window of opportunity to 'get into the fight' in 2001, the fleeting chance for CANSOF to prove itself might never come again.

The last group is the 'men in the arena', the officers and non-commissioned officers of JTF 2 in particular and CANSOF in general. Those whose professionalism, faith in each other, and uncommon commitment to excellence drives them to accomplish their mission no matter the obstacles. Having served with this group since 9/11, their patriotism, humility, sense of humour and dedication to duty are simply awe-inspiring. A capability, whether a strategic resource or strategically relevant, is nothing without people willing to sacrifice for the common cause.

### Recommendations

The author conducted 24 interviews with subject matter experts including former politicians, senior public servants, military personnel, and journalists. All of who are familiar with JTF 2 and the contemporary CANSOF community. Each interview was executed as an oral history interview and adhered to the US Army and Canadian DND policies of informed consent in compliance with US and Canadian federal law.<sup>152</sup> The subject matter experts come from different segments of Canadian society, have varied backgrounds, and experience levels. Insights

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<sup>152</sup> Please see the Appendix for an example of the informed consent waiver.

are readily gained from the opinions of such a disparate group despite the rather small sample size. Although there is no unanimity of thought insofar as definitively proving the central argument, there is broad consensus on a number of related issues.

The following is a list of subject areas which may warrant further research, as they are topics or issues that engender a wide diversity of opinion and perspective.

1. JTF 2 is a nationally recognized and trusted brand within the defence, security, and political communities. Although there will always remain detractors, very few informed people argue against a first rate, CT capability as an essential national capability. However, the other elements of CANSOFCOM do not yet engender that same level of support and thus remain at risk (e.g. the SO Avn unit could revert to the Royal Canadian Air Force). To remain a world-class SOF capability CANSOFCOM cannot be disaggregated. Is this a fact or CANSOF bias?
2. Canada requires combat-capable GPF and SOF. They are mutually supporting entities. Each optimized for the conduct of operations within different operational environments. For a middle power such as Canada, this maximizes the flexibility to respond most anywhere along the spectrum of conflict. What is the appropriate balance between the two and is the current construct achieving that balance?
3. Published government policy in the Canadian national security domain is rarely an indicator of a paradigm shift in thinking. It usually indicates decisions already made in response to a strategic shock. This is so because Canada has no grand-strategy or a legislative remit to produce a national security strategy. Therefore, national strategies are almost wholly emergent in nature, and generally reactionary.<sup>153</sup> Is this an acceptable situation for a leading, democratic, middle power?

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<sup>153</sup>Henry Mintzberg and James Brian Quinn, *Readings in the Strategy Process*, 3rd ed.

4. CANSOF must continue along the current path of proactively engaging academia and the media. There simply is not enough fact-based literature written, studied, and openly debated about CANSOF and its value to the Nation. The lack of a more extensive dialogue is a threat to the organization's future.<sup>154</sup> As with any profession that does not engage in an open, professional exchange of ideas, CANSOF faces the likelihood of becoming insular, myopic, and out of touch with the citizens it serves. As events pass into history, CANSOF must seize the initiative, own the narrative, and tell its story or others will tell it for us on their terms.<sup>155</sup> A benefit of engaging Canadians is it fosters the vital link that military organizations require to remain connected to the people they serve. Paraphrasing Clausewitz's famous trinity, war is only possible by connecting the people to their military, and uniting them both with their government and its agenda. So all are united in common cause, purpose, and prepared to endure the necessary sacrifices.<sup>156</sup> Some believe this level of transparency is not the Canadian way when discussions turn to national security. The author strongly believes that in a modern democracy the people have a right to know the broad actions taken on their behalf (albeit after the fact and safeguarding TTPs).

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(Upper Saddle River, NJ: Prentice Hall, 1998), 24.

<sup>154</sup> "There have also been unheralded deployments of Canadian Special Forces." This single line is all that is publically stated with respect to CANSOF efforts in Afghanistan by the much-anticipated 'Manley Commission'. Manley, et.al., 22.

<sup>155</sup>An example is an early book on JTF 2. See Pugliese, David. *Canada's Secret Commandos: The Unauthorized Story of Joint Task Force Two*. Ottawa, ON: Esprit de Corps Books, 2002. Other examples, although not CANSOF specific, provide accounts that implicate the CAF. See Tim Bird and Alex Marshall, *Afghanistan: How the West Lost its Way* (New Haven, CT: Yale University Press, 2011), 105 and Rajiv Chandrasekaran, *Little America: The War within the War for Afghanistan* (Toronto, ON: Random House of Canada Limited, 2012).

<sup>156</sup>Carl Von Clausewitz, *On War*, trans. and ed. Michael Howard and Peter Paret (Princeton, NJ: Princeton University Press, 1984), 89.

For they are the ones in whose name military personnel kill and are killed. Is this correct?

## CONCLUSION

Fortune is never on the side of the fainthearted.<sup>157</sup>  
—Sophocles

Since the end of WWII, the GoC consistently identifies the operational requirement for the CAF to be capable of conducting operations throughout the ‘range of conflict’ to include in asymmetrical environments. However, the pre-9/11 national security paradigm is sub-optimized and many national leaders know this. Although for many years a trend line is discernible proving the bureaucracy is capable of adaptation to a transforming security environment, the reality is the national security capability array lags behind the national security threats. 9/11 is the catalyst which finally causes a 40+ year trend to reach its tipping point, creating a new national security paradigm by way of a significant shift in the national security mindset and enterprise. As a result of the paradigm shift JTF 2, as an institutional outlier, is postured to benefit. CANSOF is the only CAF organization truly optimized for the new asymmetrical security environment.

In 9/11’s immediate aftermath, possessing limited military strategic response options, the GoC commits 40 men from JTF 2 to fight in Afghanistan alongside our US allies. The CANSOF Task Force performs exceptionally well in combat. It is a valued contribution to the war effort by Canada’s key ally and continental partner producing a disproportionately positive national strategic benefit. This is an unexpected turn of events, save for a few informed insiders who still nevertheless could not have anticipated all the future ramifications.

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<sup>157</sup>Sophocles, “Ancient/Classical History,” About.com, [http://ancienthistory.about.com/library/bl/bl\\_q\\_soph\\_phae.htm](http://ancienthistory.about.com/library/bl/bl_q_soph_phae.htm) (accessed 11 April 2013).

National leaders realize SOF is highly cost effective for a middle power, and as its visibility grows, an awareness of its strategic utility becomes clearer. Focused investments, continued success on operations and staff effort close capability seams. By 2005, all of the strategic conditions are set to enable a visionary CDS to rapidly create a fourth service, and CANSOFCOM is established. With all of the requisite SOF tactical elements now aligned within an effective C2 and governance model, the capability becomes fully legitimized, as a unique element of military power. This sequence of events is not possible if the 2001-02 OEF campaign is not strategically successful. Therefore, the OEF deployment is the seminal event that ultimately enables the CANSOF transition from a strategic resource to being strategically relevant.

9/11 is the forcing function for the new national security paradigm. Intuitively grasping the ramifications, two military-strategic leaders see a window of opportunity in the immediate weeks that follow, a window which will remain open ever so briefly. Gen Ray Henault and VAdm Greg Maddison, reassured by LCol Clyde Russell appreciate that in times of great uncertainty, there is great risk. With great risk often comes great reward. JTF 2 is an outlier when the world changes; on the backs of 40 selected men is carried the future of CANSOF.

Entering its third decade, CANSOF's story does not end here. There is a constituency within CANSOF firmly wedded to the idea that CANSOF will never reach its end state. They believe in the mantra of continual evolution and adaptation to ensure CANSOF maintains tactical and technological overmatch against Canada's enemies.<sup>158</sup> The adversaries whom CANSOF is optimized to combat are cellular in nature and highly creative. As the enemy morphs, so must CANSOF. It is simply a fact of life for the successful conduct of irregular warfare.

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<sup>158</sup>JTF 2 in particular is the embodiment of a great organization. By ensuring the "core ideology" is understood by everyone in the unit JTF 2 drives itself forward with a relentless pursuit of excellence and by "preserving the core while stimulating progress". For more information on these concepts see Jim Collins and Jerry I. Porras, *Built to Last: Successful Habits of Visionary Companies* (New York, NY: Harper Collins Publishers, 2002), Ch. 1, 54, Ch. 4.

## APPENDIX A

### INFORMED CONSENT DOCUMENTS

#### **Informed Consent**

**Title of Research Project:** 9/11 and Canadian Special Operations Forces: How '40 Selected Men' Indelibly Influenced the Future of the Force

**Investigator:** LCol Stephen J Day  
US Army School of Advanced Military Studies, Fort Leavenworth, Kansas  
[stephenjday@hotmail.com](mailto:stephenjday@hotmail.com)  
(613) 371-3812

**Supervisor:** Peter J Schifferle, PhD  
US Army School of Advanced Military Studies, Fort Leavenworth, Kansas  
[peter.j.schifferle.civ@mail.mil](mailto:peter.j.schifferle.civ@mail.mil)  
(913) 758-3258

#### **Purpose of the Research:**

This research is being conducted in partial fulfillment of the requirements of the Master of Military Arts and Science (major in strategic studies) from Kansas State University.

#### **Objective of the Research:**

The objective of this research is to determine the seminal factor leading to the exceptional growth of Canadian Special Operations Forces (CANSOF) over its first twenty years.

#### **Description of the Research:**

A key source of information supporting this research is interviews with subject matter experts from across government as well as leading Canadian journalists.

Other sources of information that will inform this research include academic literature, military policy, records/documentation of advisory boards, commissions, inquiries, task forces, etc. related to CANSOF.

You are invited to participate in an interview to contribute your insights and experiences to an analysis of the organizational context, climate and culture of the Department of National Defence and the Canadian Armed Forces (including internal and external pressures/considerations, and decision-making processes). This information will contribute to knowledge regarding how leadership understood, accommodated, and assessed the strategic value and necessity for investments in the CANSOF capability.

#### **Your Participation:**

Participation in this research is voluntary. If you choose to participate in this study you may withdraw at any time. If you choose to withdraw subsequent to participation in an interview, all existing record of the interview will be destroyed (hard copies shredded and electronic copies

deleted by the principal researcher).

Prior to your participation in an interview, you will have an opportunity to ask questions about the project and your participation. The interview will not proceed until you are satisfied that you have adequate understanding and have provided your informed consent. Further, you will have an opportunity to review a draft of the research paper to confirm you are comfortable with the context of how you are being cited.

Wherever possible, interviews will be recorded to assist with comprehensive and accurate documentation of the interview. Sound recordings of the interview will be made available to an unidentified 3<sup>rd</sup> party for the purpose of transcription.

Upon completion of the research project the record of interviews with individuals who request anonymity and confidentiality will be shredded by the principal researcher and the electronic record will be deleted. The record of interviews with participants who provide consent to their identification will be retained for archiving for subsequent research access at the US Army's Combined Arms Research Library (CARL) in Fort Leavenworth, Kansas and the Royal Military College of Canada (RMCC) in Kingston, Ontario.

A copy of the transcription of the sound recording of your interview or a copy of the notes taken during your interview will be provided to you for review and feedback prior to use as research data.

**Confidentiality:**

Your confidentiality will be respected and no information that discloses your identity will be released or published without your explicit consent unless required by law. However, should you waive your right to protection of your anonymity and confidentiality, your name may be included in the reporting of research findings.

**Access to Research Information:**

This research will be available at CARL and RMCC. In addition, you can request that a copy be forwarded to you upon acceptance by RMCC.

**Reimbursement:**

No monetary compensation will be offered in exchange for consent to participate or participation in an interview.

**Contact:**

- If you have any questions about this study, please contact LCol SJ Day using the contact information provided above.
- If you have questions regarding your rights as a research participant, you may contact:

Dr. Allister MacIntyre,  
Chair, Research Ethics Board Graduate Studies Committee

Phone: (613) 541-6000 ext. 6408  
Email: [allister.macintyre@rmc.ca](mailto:allister.macintyre@rmc.ca)  
Postal: Royal Military College of Canada  
PO Box 17000, Station Forces  
Kingston, Ontario CANADA K7K 7B4

**PARTICIPANT CONSENT:**

**1. *Consent to participate***

I \_\_\_\_\_ understand the purpose of this research; I  
(print name)

have had an opportunity to ask questions about the research and its objectives,  
and agree to participate in an interview.

**2. *Consent to disclosure of identity***

I DO / DO NOT agree to the disclosure of my identity in the reporting  
(circle one and initial)

of research findings resulting from my participation in this interview.

**3. *Consent to sound recording***

I DO / DO NOT agree to sound recording of this interview.  
(circle one and initial)

\_\_\_\_\_  
(signature)

Date: \_\_\_\_\_

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