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**SOF Quills for the Porcupine:
Applying Lessons from Ukraine to Taiwan**

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On the cover:

A porcupine with quills containing the Fairbairn-Sykes dagger, an international symbol for Special Operations Forces, against a backdrop of Ukraine and Taiwan flags. Source: Claire Luke for JSOU Press

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SOF QUILLS FOR THE PORCUPINE: APPLYING LESSONS FROM UKRAINE TO TAIWAN

Introduction

In October 2022, President Biden published the *National Security Strategy* to reaffirm the enduring primary national interest of protecting American security.¹ To accomplish this goal, the United States must address the changing distribution of power across the global landscape, particularly among our peer and near-peer competitors. Both China and Russia have made significant investments to challenge the United States' ability to protect its interests and allies. However, China's increasing assertiveness and capabilities across all elements of national power have demonstrated its potential to be the primary long-term threat to U.S. national security.²

The U.S. has a renewed interest in protecting the stability of an open and collaborative international system from destabilizing actions by Russia and China. Russia's 2022 invasion of Ukraine has had a chilling effect on the global security landscape and led some nations to reevaluate their previous assumptions regarding world powers' willingness to escalate into open conflict and aggression. Many wonder whether China would be similarly willing to engage in a military invasion of Taiwan. Like Ukraine, Taiwan has endured for decades as a democratic underdog bordering a much larger authoritarian regime. The U.S. has repeatedly committed its support to Taiwan and has vowed to intervene militarily should China try to take Taiwan by force.³

Deterrent “Quills”

CIA Director William Burns assesses that Russia's invasion of eastern Ukraine may inform China's plan to gain control of Taiwan.⁴ Given the remarkable challenge Ukrainian resistance forces have presented Russia, Richard Clarke, General, U.S. Army, Ret. (Commanding General of United States Special Operations Command [USSOCOM] from 2019 to 2022), shares the desire of many U.S. officials for “Taiwan, just like Ukraine has been, to be an indigestible porcupine.”⁵ As of this writing, Ukraine has managed to avoid being metaphorically swallowed by Russia due to Ukraine's

1. White House, *National Security Strategy* (Washington, D.C.: White House, 2022), 2, <https://www.whitehouse.gov/wp-content/uploads/2022/10/Biden-Harris-Administrations-National-Security-Strategy-10.2022.pdf>.

2. “Fact Sheet: 2022 National Defense Strategy,” Department of Defense, 2022, <https://media.defense.gov/2022/Mar/28/2002964702/-1/-1/1/NDS-FACT-SHEET.PDF>.

3. White House, *National Security Strategy*; White House, “Remarks by President Biden and Prime Minister Kishida Fumio of Japan in Joint Press Conference,” 23 May 2022, transcript, <https://www.whitehouse.gov/briefing-room/speeches-remarks/2022/05/23/remarks-by-president-biden-and-prime-minister-fumio-kishida-of-japan-in-joint-press-conference/>.

4. Edward Luce and William Burns, “Transcript: Vladimir Putin ‘Doesn’t Believe He Can Afford to Lose,’” *Financial Times*, 8 May 2022, <https://www.ft.com/content/bd87fafd-1f9c-4dcd-af64-940cf9495ce5>.

5. Richard Clarke, “Security Challenges in a Contemporary Environment” (Panel discussion, Sedona Forum, Arizona: McCain Institute, 30 April 2022), www.mccaininstitute.org/the-sedona-forum/.

conventional arsenal of deterrent “quills” comprised (in part) of ballistic missile defense, air defense, mine warfare, sea-denial fires, shore-denial fires, jamming, decoys, deception, civil defense, urban warfare, and life-essential infrastructure.⁶ Nevertheless, the U.S. and its allies have been reluctant to directly engage in open conflict with Russia or China due to the cataclysmic costs such a war might impose. Special Operations Forces (SOF) are uniquely suited for the delicate task of filling strategic deterrence gaps left by conventional capabilities.⁷ Furthermore, General Clarke asserts that SOF efforts, such as training, civil affairs (CA), psychological operations (PSYOP), and military information support operations (MISO) have added quills to the Ukraine porcupine.⁸ Like Ukraine, Taiwan has deterrent quills of its own that give mainland China pause, but Taiwan will require development in this area to resist an invasion similar to Russia’s.⁹

Much of the published scholarly discourse surrounding China’s ultimate plan for Taiwan is speculative and posits various invasion scenarios motivated by the Chinese Communist Party’s stated goal of so-called reunification. Some scholars, such as historian Hal Brands, assert that Russia’s 2022 invasion of eastern Ukraine may embolden China to invade Taiwan.¹⁰ Others, including China scholar Joel Wuthnow, propose that the People’s Liberation Army (PLA) is likely learning lessons in conventional warfare from Russian operations in Ukraine.¹¹ Surprisingly, such discourse seems to omit the applicability of SOF and overlooks the value of applying “lessons gathered” from SOF operations in the Ukraine conflict to SOF operations in Taiwan. This paper aims to fill that research gap by summarizing SOF activities in Ukraine, gathering lessons from those activities, and discussing how those lessons can inform SOF operations in the Taiwan problem set. Lessons gathered from SOF activities in Ukraine include the importance of strengthening resistance capabilities, fostering long-term alliances, and leveraging cutting-edge technology to dominate the information war. Proper application of these lessons will add deterrent quills to Taiwan, making it indigestible to China.

6. Andrew Erickson and Gabriel Collins, “Eight New Points on the Porcupine: More Ukrainian Lessons Learned for Taiwan,” *War on the Rocks*, 18 April 2022, <https://warontherocks.com/2022/04/eight-new-points-on-the-porcupine-more-ukrainian-lessons-for-taiwan/>.

7. Robert Haddick, *How Do SOF Contribute to Comprehensive Deterrence?* (Tampa: JSOU Press, 2017): 4.

8. *Before the Senate Armed Services Committee*, 117th Cong. (5 April 2022) (Statement of General Richard D. Clarke, USA, Commander, United States Special Operations Command), [https://www.armed-services.senate.gov/imo/media/doc/2022%20USSOCOM%20Posture%20-%20Clarke%20-%20SASC%20\(5APR22\)%20\(FINAL\).pdf](https://www.armed-services.senate.gov/imo/media/doc/2022%20USSOCOM%20Posture%20-%20Clarke%20-%20SASC%20(5APR22)%20(FINAL).pdf); Clarke, “Security Challenges.”

9. James Timbie and James O. Ellis Jr., “A Large Number of Small Things: A Porcupine Strategy for Taiwan,” *Texas National Security Review* 5, no. 1 (Winter 2021/2022): 83–93, *TNSR_Vol5_Iss1_Winter2021_2022* (print-this.net)

10. Hal Brands, “Putin’s Struggles in Ukraine May Embolden Xi on Taiwan,” *Bloomberg Opinion*, 21 April 2022, <https://www.bloomberg.com/opinion/articles/2022-04-21/russia-ukraine-war-putin-s-struggles-may-embolden-xi-s-china-on-taiwan>.

11. Joel Wuthnow, “Rightsizing Chinese Military Lessons from Ukraine,” *Strategic Forum*, no. 311 (September 2022), <https://ndupress.ndu.edu/Media/News/News-Article-View/Article/3146628/rightsizing-chinese-military-lessons-from-ukraine/>

Bolstering SOF Infrastructure

In response to Russia's 2014 seizure of Crimea and Donbas, USSOCOM joined European allies in bolstering Ukraine's SOF infrastructure.¹² Such infrastructure included the establishment of Ukraine's national resistance strategy in January 2022, which "gave the commander of the [Ukrainian] armed forces authority to manage [...] the resistance movement through the commander of Special Operations Forces."¹³ This strategy is consistent with the "Total Defense Model" for pre-crisis resilience, described by resistance scholar Otto Fiala as a

'whole of government' and 'whole of society' approach, which include interoperability among its forces and those of its allies and partners. This establishes a common operational understanding and lexicon for resistance planning and its potential execution in total defense, incorporated with National Defense Plans.¹⁴

USSOCOM and NATO forces have been providing resistance training to Ukrainian SOF since 2014 and 2015, respectively.¹⁵ The successful resistance efforts of military and civilian Ukrainian fighters are likely due, in part, to the resistance training that Special Operations Command Europe provided Ukrainian SOF over the last several years at a training site near Kyiv (see figure 1).¹⁶ Additional training has taken place at the Lviv-based Yavoriv Combat Training Center (see figure 1).¹⁷ This site's strategic location on Ukraine's western border facilitates Ukrainian SOF's ability to stage resistance west of Kyiv should invading Russian forces succeed in seizing the capital.

Ukraine's resistance strategy appears to be working. The Congressional Research Service assessed that U.S. SOF's support leading up to Russia's incursion "has helped Ukraine to successfully defend its territory against ongoing Russian attacks."¹⁸ As of this writing, Russian forces have failed in their months-long attempt to seize Kyiv—a failure which has undoubtedly been noticed by the Taiwanese government as it postulates the impact of Vladimir Putin's actions on Xi Jinping's plans for Taipei. In light of the successful establishment of a national resistance strategy by Ukraine (as well as the Baltic states), the Taipei government could benefit from incorporating a similar strategic approach into their SOF infrastructure.¹⁹

12. Clarke, "Security Challenges."

13. Stephen J. Flanagan and Marta Kepe, "What Kind of Resistance Can Ukraine Mount?" *DefenseNews*, 26 February 2022, <https://www.defensenews.com/opinion/commentary/2022/02/26/what-kind-of-resistance-can-ukraine-mount/>.

14. Otto C. Fiala, *Resistance Operating Concept* (Tampa: JSOU Press, 2020): 1.

15. Statement of General Richard D. Clarke; Flanagan and Kepe, "Ukraine Resistance."

16. John Vandiver, "US Special Operations Presses on in Ukraine amid Threat of Russian Invasion," *Stars and Stripes*, 19 January 2022, <https://www.stripes.com/theaters/europe/2022-01-19/special-forces-press-on-in-ukraine-amid-threat-of-russian-invasion-4343248.html>; Central Intelligence Agency, "Ukraine," in *CIA World Factbook*, <https://www.cia.gov/the-world-factbook/countries/ukraine/>.

17. Flanagan and Kepe, "Ukraine Resistance."

18. "U.S. Special Operations Forces (SOF): Background and Issues for Congress," *Congressional Research Service*, 7-5700 (Washington, D.C.: CRS, 11 May 2022), <https://crsreports.congress.gov/product/pdf/RS/RS21048>.

19. Will Irwin, "Taiwan: Resilience and Preparation for Resistance," Joint Special Operations University, May 2021, YouTube video, 58:07, <https://www.youtube.com/watch?v=fYAERUQcyDY&list=PLDdkXV7z6CqO-Jr4J74w2zAO571mmI3VQ&index=11>.

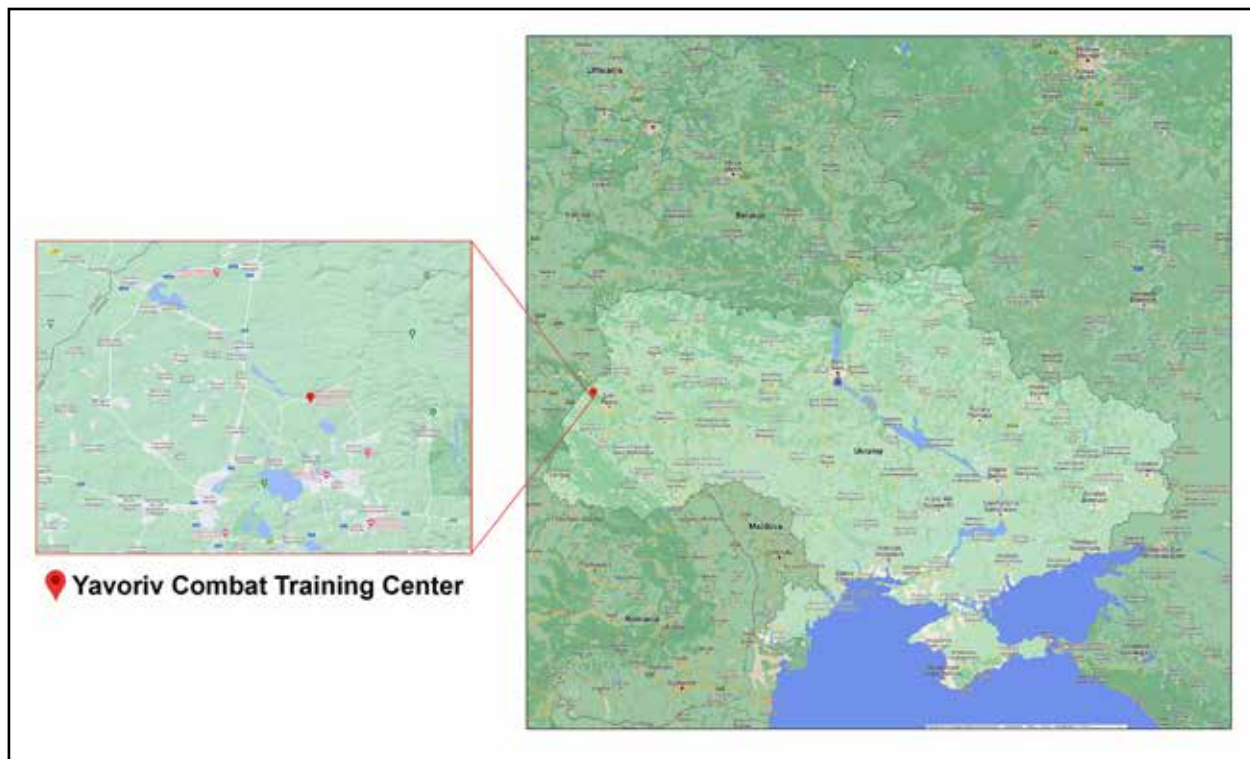


Figure 1. Special Operations Forces Training Areas in Ukraine. Source: Google Maps data modified by Authors

Xi has the benefit of observing Putin’s Ukraine strategy and adjusting China’s Taiwan strategy accordingly. As Xi surveys the operational delays in Russia’s invasion, as well as the compounding logistical complexity such delays have caused, he is likely reminded of a PLA warfighting philosophy: “Strive to catch the enemy unexpectedly and attack him when he is not prepared, to seize and control the battlefield initiative, paralyze and destroy the enemy’s operational system, and shock the enemy’s will for war.”²⁰

Xi will want to seize control of Taiwan in a matter of days—not months—to avoid repeating Putin’s costly mistakes in Ukraine.²¹ To accomplish this, Xi must destroy governance in the country’s largest cities immediately to prevent them from gaining international support.²² With a population of 2.5 million, Taipei presents a similar resistance scenario to China as Kyiv has presented to Russia.²³ Other large metro areas, such as New Taipei City (which has a population of 4.5 million), Taoyuan (2.3 million), Kaohsiung (1.5 million), and Taichung (1.3 million), compound China’s problem of

20. *Science of Military Strategy*, trans. China Aerospace Studies Institute (Montgomery: Air University, 2020), 143, https://www.airuniversity.af.edu/Portals/10/CASI/documents/Translations/2022-01-26%202020%20Science%20of%20Military%20Strategy.pdf?ver=2G_odIHsjMVSc2dx742PNQ%3D%3D.

21. Clarke, “Security Challenges.”

22. Joel Wuthnow, “Strategic Threat Orientation” (lecture, Strategic Campaign Design 14, Joint Forces Staff College, 22 April 2022).

23. “Taiwan,” *The World Factbook* (Washington, D.C.: CIA), accessed 13 March 2022, <https://www.cia.gov/the-world-factbook/countries/taiwan/#people-and-society>.

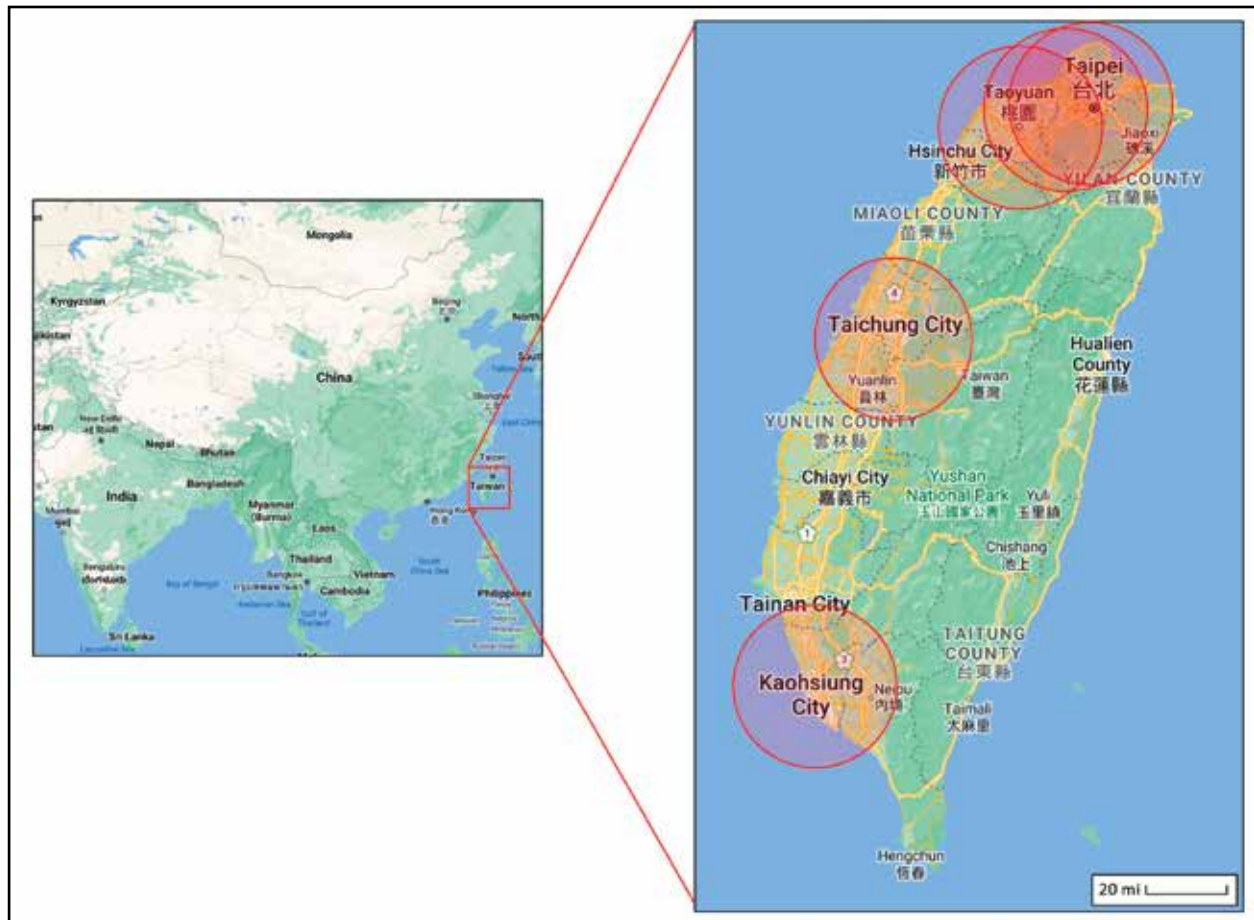


Figure 2. Proposed Special Operations Forces Training Areas in Taiwan.
 Source: Google Maps data modified by Authors

destabilizing Taiwan.²⁴ Fortunately, SOF can provide Taiwan with asymmetric advantages for countering China’s destabilization efforts should China pursue a forceful invasion and occupation of Taiwan.

U.S. officials believe improvements to Taiwan’s resistance capabilities would be effective in deterring Chinese aggression.²⁵ Such improvements would likely involve combined training of Taiwanese SOF for purposes of hardening Taiwan’s infrastructure and defeating foreign SOF that would appear early in an invasion.²⁶ However, if Taiwanese SOF and Special Operations Command Pacific (SOCPAC) hope to achieve success comparable to the Ukrainian resistance’s success against Russia, they will need to establish a robust SOF footprint in Taiwan. To this end, the five proposed SOF training areas shown in figure 2 reflect similar location criteria used to establish the training sites in figure 1. These proposed training areas are each 20 miles in radius and centered in Taiwan’s

24. “Taiwan.”

25. *Before the Senate Armed Services Committee*, 117th Cong. (25 March 2021) (Statement of Christopher P. Maier, Nominee to Be Assistant Secretary of Defense for Special Operations and Low-Intensity Conflict), <https://www.armed-services.senate.gov/imo/media/doc/Maier%20Opening%20Statement.pdf>

26. Wuthnow, “Strategic Threat Orientation.”

most heavily populated urban areas (Taipei, New Taipei City, Taoyuan, Kaohsiung, and Taichung), offering access to military and civilian personnel charged with defending Taiwan and its governance against invading forces.

The most heavily shaded region in northern Taiwan illustrates intersecting (proposed) training areas around Taipei, New Taipei City, and Taoyuan. In the event of a Chinese invasion of Taiwan, the most heavily shaded region could become the heart of resistance in Taiwan. Should combined SOF commit time and resources to resistance training for this region, their investment in the local populace will pay dividends in preventing a swift Chinese invasion.

Resistance efforts before and after a Chinese invasion may not be geographically restricted to Taiwan. According to strategic studies scholars Jared McKinney and Peter Harris, “China could be

Resistance efforts before and after a Chinese invasion may not be geographically restricted to Taiwan.

made to expect [...] the prospect of violence being exported to the mainland.”²⁷ Combined SOF are positioned to influence Chinese citizens’ political will. Any related popular uprisings will complicate matters for Xi and likely undermine the support of his inner circle.

Russian SOF operations in Ukraine leading up to the 2014 annexation of Crimea can help inform combined SOF resistance efforts in mainland China. According to a case study from Fiala,

Foremost was the ability to identify and capitalize on the inherent weaknesses of both operational areas within Ukraine through effective exploitation. A large ethnically Russian population (though less than a majority in Eastern Ukraine) supported Russia’s objectives. That population also made it easier for Russian Special Forces to disguise themselves as locals. This gave Russia plausible deniability when it claimed that local inhabitants were merely expressing dissatisfaction with the Kiev government and acting against that government.²⁸

Lessons from this case study can shape SOCPAC efforts to (1) assimilate combined SOF from the United States Indo-Pacific Command (USINDOPACOM) area of responsibility (AOR) into Chinese culture, then (2) conduct similar resistance efforts in mainland China to convey citizens’ dissatisfaction with and action against the Beijing government in response to any unilateral aggression toward Taiwan. As was the case with Russian SOF during their operations in Crimea, assimilation and resistance will be most effective if the combined SOF look and speak like local citizens.

27. Jared M. McKinney and Peter Harris, “Broken Nest: Deterring China from Invading Taiwan,” *Parameters* 51, no. 4 (November 2021), 23–36, <https://press.armywarcollege.edu/parameters/vol51/iss4/4/>.

28. Fiala, *Resistance Operating Concept*, 119.

SOF Long-Term Relationships

Long-term relationships between NATO SOF and Ukrainian SOF were crucial to building resistance and resilience capabilities with Ukrainian forces.²⁹ To continue fostering that relationship, NATO SOF have invited Ukrainian SOF to participate in NATO exercises throughout Europe, including the annual COMBINED RESOLVE exercise in Germany.³⁰ Similarly, U.S. SOF have had relationships with Asian partners dating back to World War II, but the intentionality of some of those relationships declined as SOF became occupied with the Global War on Terror (GWOT) and stretched thin in support of operations in Iraq and Afghanistan. When USSOCOM began shifting its primary mission focus from the GWOT back to global strategic competition between 2017 and 2019, USSOCOM redistributed its forces to optimize its presence in the USINDOPACOM area of responsibility.

Today, in line with this strategic pivot to the east, U.S. SOF is building long-term relationships with 20 different countries in the USINDOPACOM AOR.³¹ Such relationships are reinforced by combined participation in SOF-specific evolutions that nest within conventional training exercises specific to the region (i.e., RIM OF THE PACIFIC, COBRA GOLD, BALAKATAN, and KEEN SWORD). If combined SOF hope to foster a relationship with Taiwanese SOF, they would benefit from training together in more international exercises.

As a result of their long-term relationships and interoperability, U.S. SOF and Ukrainian SOF shared information warfare and technology victories in the months leading up to Russia's 2022 invasion. Two such victories are particularly relevant to the Taiwan problem set. First, SOF personnel within the CA, PSYOP, and MISO communities likely gathered the value of acquiring, declassifying, and disseminating (all likely with the help of interagency partners) imagery via social media for purposes of countering Russian misinformation. Such intelligence sharing built a coalition of countries committed to sharing the truth, then allowed them to push back against Russia together.³²

Such intelligence sharing built a coalition of countries committed to sharing the truth, then allowed them to push back against Russia Together.

Because of SOF's role in the Ukraine conflict, they are uniquely equipped to apply these lessons gathered from the information and technological battlefields to help Taiwan counter Chinese disinformation and own the information environment. U.S. SOF learned where their

technological shortfalls were in dominating the information war. According to General Clarke, "Ukrainian leadership has used the information space to boost morale and expose the truth about the Russian military's actions in Ukraine, effectively swaying the world against Russia. But now, the U.S. needs to start thinking about what authorities, tools, and capabilities it will use in the

29. Clarke, "Security Challenges."

30. Betsy Woodruff Swan et al., "Pentagon Push to Send More Trainers to Ukraine Was Scrapped in December amid White House Fears of Provoking Russia." *Politico*, 13 March 2022, <https://www.politico.com/news/2022/03/13/briefing-white-house-nixed-december-plan-to-boost-special-ops-presence-in-ukraine-00016830>.

31. Clarke, "Security Challenges."

32. Clarke, "Security Challenges."

information space against a more difficult adversary.”³³ General Clarke also shared his concerns that U.S. SOF do not have the tools they need to “fight disinformation and own the information environment,” adding that USSOCOM “will struggle to develop, continue its counterterrorism role, and shift to peer and near-peer competition” if the command does not receive a 3-to-5 percent budget growth over the next five years.³⁴ In fiscal year (FY) 2022, USSOCOM’s \$9.377 billion in operations and maintenance (O&M) appropriations funds marked a decrease of \$51 million (-.05%) from the \$9.428 billion enacted in FY 2021.³⁵ For USSOCOM to achieve maximum effectiveness in its counterterrorism and strategic competition roles, the command may require an annual O&M increase of \$470 million through FY 2025.

Russia’s 2022 incursion into Ukraine represents an unprovoked act of aggressive behavior summarily noted in well-worn chapters of the Cold War manifesto. Based on Ukraine’s ongoing yet strong resistance, combined SOF’s strategy to train Ukrainian SOF has sharpened and increased the country’s indigestible cache of quills. As the Russian bear continues to amble clumsily throughout Ukraine’s sovereign land, it is experiencing extraordinary difficulty swallowing the porcupine it decided to attack. Similarly, China’s ongoing expansionist aggression toward Taiwan shares many attributes associated with Russia’s invasion of Ukraine. To overcome a potential offensive from China, leveraging lessons gathered from Ukraine, coupled with expanding SOF training

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opportunities throughout Taiwan, China will most likely encounter challenges comparable to those experienced by Russia. Beijing’s continued yet methodical encirclement of Taiwan has the hallmarks of a giant anaconda, preparing to capture and squeeze its victim. While the country may experience significant pressure from China, the Taiwan porcupine will be indigestible if it adopts SOF quills used by Ukraine to resist Russia’s invasion.

Comparison and Study

Some critics will be quick to opine that Russia’s execution of actual military operations in Ukraine cannot be construed as equal to theoretical Chinese military actions in Taiwan. After all, the cultures, sizes, and employment of Russia’s and China’s militaries are vastly different. Russia’s military is considerably less significant than China’s, and Ukraine presents a much different geographic challenge than does the relatively small island-nation of Taiwan. Admittedly, the

33. Andrew Eversden, “Watching Ukraine, U.S. Special Ops Realizes It’s Behind on Information War Capabilities.” *BreakingDefense*, 20 May 2022, <https://breakingdefense.com/2022/05/watching-ukraine-us-special-ops-realizes-its-behind-on-information-war-capabilities/>.

34. Eversden, “Watching Ukraine”; Todd South, “Special Ops Leader Issues Warning Over Information Warfare Capabilities, Funding,” *C4ISRNET*, 17 May 2022, <https://www.c4isrnet.com/information-warfare/2022/05/17/special-ops-leader-issues-warning-over-information-warfare-capabilities-funding/>.

35. Matthew Allen, “Overview of USSOCOM Authorizations” (PowerPoint presentation, Crystal City, VA, 20 July 2022).

two problem sets are not identical. However, the threat of invasion, as well as the opportunity for resistance, remains credible despite differences in geography, culture, and military effectiveness.

Researchers with a strong interest in the role of SOF in strategic competition will likely have plenty of topics to discover in the coming decades. The China and Russia problem sets are rich in important research topics that have not yet been explored. A comparison of China's SOF activities in Taiwan to Russia's SOF activities in Ukraine could be one such subject of study, especially as they pertain to joint conventional warfare equities in strategic reconnaissance, seabed warfare, and military deception in the littorals of Ukraine and Taiwan. Researchers may also find the prospect of qualitative or quantitative comparisons of the Baltic states' national resistance strategies useful, especially if such an analysis includes recommendations (grounded in doctrine) for improvement. Additional suggested research topics can be found in the Special Operations Research Topics booklet, published annually by the Joint Special Operations University Press.³⁶↑

36. "Publications," *JSOU Press*, Joint Special Operations University, accessed 25 October 2022, <https://www.jsou.edu/Press/Publications>.

ACRONYMS

AOR	area of responsibility
CA	civil affairs
FY	fiscal year
GWOT	Global War on Terror
MISO	military information support operations
O&M	operations and maintenance
PLA	People's Liberation Army
PSYOP	psychological operations
SOCPAC	Special Operations Command Pacific
SOF	Special Operations Forces
USINDOPACOM	United States Indo-Pacific Command
USSOCOM	United States Special Operations Command



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