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Critically engaging the concept of joint operations: origins, reflexivity and the case of Sweden

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Introduction

The term “joint operations” has a particular cachet in the armed forces of the West. Its ubiquity in military language, formations and education from the 1980s onwards suggests that it forms the basis of all military operations. At the surface level, it seems uncontroversial and logical. All three traditional armed services, land, sea and air (and now space and cyberspace) working together to produce military success. In reality, it is a concept historically steeped in tension, failure and frustration. Worse still, it was a controversial idea imposed on the military by civilian intervention. Notwithstanding, a difficult birth and growing pains, it has become a vogue and very influential term within military organisations in the West. It is a sensible proposition to assume, given the importance of the concept, that there must be a wealth of information on the topic, but drilling down *specifically* on the modern term “joint operations” that emerged forty years ago in the United States reveals thin intellectual soil. This raises important questions (not covered here): how long does it take a new military concept to gain purchase within the armed forces, in the wider academic milieu that support them and on combat effectiveness in warfare?

The bulk of the work to date on joint operations lies within the realm of doctrine production inside of military organisations. The first major foray into this area was Joint Publication JP 3–0 *Doctrine for Joint Operations*, now known simply as *Joint Operations*, produced in the United States in 1993 (Rowlett 2017, 122) and endorsed by the Chairman of the Joint Chiefs of Staff, General Colin Powell. Unsurprisingly, as a norm (and doctrine) entrepreneur, the focus of the United States in this area spread out rapidly to major allies such as the United Kingdom (Joint Doctrine Publication *UK Joint Operations Doctrine* JDP 01) and its critical alliance NATO (Allied Joint Publication *Allied Joint Doctrine* AJP 01). There is a growing proliferation of these “joint” publications in the US, allies and NATO, but unfortunately, the enthusiasm for it has not been replicated in intellectual circles. One of the few major academic works in this area is Stuart Griffin’s *Joint Operations: A Short History* (2005) that was commissioned by the UK Ministry of Defence, but it remains a rather rare book. The standard instructional text (nearly 1500 pages) is Milan Vego’s *Joint Operational Warfare* (originally published as *Operational Warfare* in 2001, but renamed in the new 2007 edition). Interestingly, both Griffin and

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Vego work in defence education establishments and their publications reflect a need in military organisations for more knowledge production and support in this area.

The National Defence University in Washington has also contributed to the development of the concept with its glossy defence journal, *Joint Force Quarterly*, which is largely focused at a military audience. In sum, there has not been a great deal of sustained academic interest in developing the contemporary concept of ‘joint operations’. This provides somewhat of a puzzle to explain why one of the most popular and influential military concepts of recent times has virtually no substantial intellectual foundations. What does this mean and what are its implications? Is the absence of deep scholarly engagement a sign of a poor graft or a lack of wider interest? Alternatively, does it reflect Morris Janowitz’s argument that “self-conceptions and professional ideology of the military officer have served as a powerful counterforce to civilianization” (Janowitz 1971, xi). In other words, dominating individual service cultures have mediated the civilian-driven concept to create an idea of “joint” that accommodates prevailing norms and values rather than optimum outcomes.

This is not a problem unique to the United States. At the height of the Global War on Terror, the Chichele Professor of War, Hew Strachan noted of the tensions within the British armed forces, “Jointness has itself become a challenge; it has become dysfunctional in the process of becoming functional” (Strachan 2009, 23). This is not surprising in view that there is no joint military service, culture or uniform. Military officers join the army, the navy or the air force and spend most of their careers and evolve their identities within these services. Only a few military organisations in the world such as Sweden train their military officers jointly at the start of their careers before they move into career specialisations. Only later, after years of service within a specific branch of the armed forces, do officers join a “joint” formation. It is interesting when moving within so-called “joint” military entities in military organisations that officers literally wear their difference: uniforms act as identity markers for respective army, navy and air force officers and they tend to congregate with their service “tribe” in coffee breaks and lunches. Put simply, joint exists superficially, and at the idea level, rather than being embedded within the very essence of military culture.

From the perspective of military academies, colleges and universities, the shortfall of academic material is a highly unsatisfactory state of affairs because of the pressing need to teach joint operations at every level of significant officer education. This is the tension at the heart of the joint operations concept in modern militaries today and represents a significant knowledge gap. This research is an attempt to develop a critical academic viewpoint within this seemingly uncontested intellectual space that takes up significant energy and effort within modern military organisations. It excavates and illuminates the meaning of joint operations through the lens of three different academic perspectives and offers an eclectic interdisciplinary approach from diverse vectors (origins, reflexivity and Sweden as a case study/receptor of American ideas), but all with a tight focus on the idea of joint operations. It starts by rationally tracing the concept back to its start point in the modern age to demonstrate that the concept of joint operations is a relatively new trend that owes its origins to a strained impetus that came out of the United States.

As the most powerful armed forces in the West and the leading power in the North Atlantic Treaty Organization (NATO), the United States holds an influential position in military affairs and the concept of joint operations quickly gained a wide purchase in

other armed forces within or arranged in a constellation, politically and geographically, around NATO. The adoption of military ideas and concepts, from one military power to another, is not, however, without interpretive and cultural challenges (Goldman 2006) as the “within aspect” of many armed forces or the “taken for granted” affects the concept of joint operations and brings with it certain preconceived notions. Inspired by the present “reflexive moment” in scholarly literature (and military practice), the second part argues the need of reflexive analyses that disentangle the conditions and political-military-scholarly interactions that have made the concept of joint operations possible and more or less unquestioned in various countries. Not least, a reflexive lens offers a useful problematization of insider/outsider dynamics in military affairs not necessarily found within the orthodoxy of traditional military studies. Finally, the research illustrates the contemporary case study of Sweden to show the concrete and long-term doctrinal effects of joint operations thinking in the twenty-first century.

Perspective 1: origins

From cooperation to interoperability

The idea of two military services or branches of the armed forces working together in a single operation is nothing new in the history of war. Since the creation of dedicated maritime forces thousands of years ago in the Mediterranean region, land and sea-based forces have often worked in cooperation to fulfil military objectives. Herodotus in his classic work, *The Histories*, mentions how Xerxes constructed a bridge between Asia and Europe using “penteconters and triremes [...] lashed together to support the bridges” (Herodotus 2003). Penteconters and triremes were naval ships that provided the platform for the bridge that enabled his vast army to invade Greece in 480 BC. Cooperation or the smooth working together of different services is the basis of the idea and it has occurred in numerous wars over the ages. Historically, this has been known as “combined operations” (Symonds 2010, 6). Ostensibly, this sounds simple, but the reality is quite different. Army and navy cooperation encapsulates the problem rather well. The movement of military power from sea to land has always been, and remains, a challenging transition. This very specialised activity is known universally as amphibious warfare and is widely acknowledged as the most difficult of military operations to conduct in the maritime environment.

History is littered with costly military operations that struggled to translate military strength at sea to quick victory on land, from Agamemnon’s alliance of Greeks at Troy to Churchill’s British imperial forces at Gallipoli. In the twentieth century, the term “combined operations” was expanded to include the armed forces of several nations working in concert together as demonstrated in the D-Day landings in France in 1944 (Symonds 2010, 6). Combined operations have many benefits. They preserve the service cultures and identities that are essential for fighting power and clearly demark lines of authority, often through the use of different stages of operation. Typically, in an amphibious assault, the naval forces will take responsibility for the landing phase of operations and switch to a support role once the land forces have established themselves on the beachhead. Naval forces may go ashore with the land forces such as marines, but they

usually come under the control of the land forces commander. These stages simplify life for hierarchy-based military organisations and limit the scope for confusion.

Joint operations: a modern American invention

The drive towards joint operations can be traced back to the armed forces of the United States and a specific era or the 1980s. The difference between combined and joint operations is best illustrated on an imaginary scale between cooperation at one end, interoperability in the middle and integration at the other. Cooperation is clearly the simplest option for armed forces, but not without challenges. Interoperability offers more potential from the three services, but requires the development of compatibility through shared training, outlook and technologies. Integration is perhaps the most difficult state to achieve, but offers the most potential through the seamless configuration of the armed forces. Military forces would fight holistically in a shared “integrated” fighting space that transcends traditional conceptions/boundaries of warfare. This is an end point that has yet to be reached in warfare and is perhaps an evolution for the future through the mature development of multi-domain operations. By the mid-to-latter part of the twentieth century, the boundaries between different aspects of warfare had become very porous. This was quite evident to a degree in World War I and World War II when air power could intervene in the domains of land and sea warfare, but with the rapid development of jet technology and helicopters, the incursions of different services into the fighting environments of other branches of the armed forces was a regular occurrence. The shift towards a “joint” trend or a movement towards interoperability between different services originated in the United States. It emerged as a solution to a pressing problem of modern military power and, remarkably, the impetus came from outside the military. It was an external intervention by civilian political elites in the organization of their armed forces. Between 1975 and 1983, three major military operations highlighted the urgent requirement for the US armed services to develop a more joint approach because without it military failure was very likely.

The first “problem” military operation was the little-known *Mayaguez* incident in 1975 named after an American merchant ship that was seized by Cambodian forces. In response, the US administration launched a military operation involving several services (US Air Force, US Marines, US Navy and Special Forces) to rescue the captured crew from Koh Tang Island. The mission acquired catastrophe status within minutes of the helicopters arriving at the island. First, the Cambodians had already released the hostages and the ship just before the helicopters packed with US Marines arrived at their targets. Second, Cambodian forces defending the island shot down three of the heavy troop-carrying helicopters in short order and caused numerous casualties. After a hard fight for the Marines, US forces were eventually withdrawn, but in the confusion of the extraction, three Marines were left behind and eventually abandoned by the US government (Maguire 2018).¹ The mission that left 41 US service personnel dead demonstrated that cooperation between the services was a major factor in the failure of the mission. As one scholar has noted, “intelligence and communications were so poor that an air force special operations pilot was forced to use walkie-talkies in combination with his aircraft radio and act as go-between for the ground forces involved in the assault” (Marquis 1997, 38). The *Mayaguez* incident highlighted that the application of force, even for the most

powerful and best-equipped armed forces in the world at the time, rested heavily on the ability of separate services to work effectively together.

The second military operation was the ill-fated rescue attempt called Operation Eagle Claw in 1980. The Iranian Revolution in 1979 led to the capture of US embassy staff in Tehran and prompted the Carter administration to initiate perhaps the most ambitious Special Forces mission in history at the time to rescue the hostages from Iran's capital. The mission involved – once more – units, technology and personnel from different services (US Army, US Air Force, US Navy and US Marines). It failed in a blaze of embarrassing publicity for the United States. The problem was again poor cooperation/ interoperability and, to a degree, a fair helping of bad luck. The mission depended on eight long-range helicopters that ran into numerous sandstorms as they headed towards a rendezvous point in Iran (having flown off US Navy ships) to meet the Special Forces (the newly formed Delta Force) that arrived at the site using C-130 transport aircraft. At the rendezvous point, it was estimated that several of the helicopters (not equipped for sandstorms) were mechanically compromised and, at the point of the abort decision, disaster occurred when one of the transport aircraft collided with a helicopter. In total, eight US service personnel died in the collision (Finlan 2009, 45–48) and the rest of the forces abandoned much of their equipment and flew out on the remaining transport aircraft leaving behind valuable technology and dead service people that were showed to the international press by the Iranians. The impact of the failure of Operation Eagle Claw was the production of a very influential document called the *Holloway Report* that specifically called for the creation of a dedicated Counterterrorist Joint Task Force (Holloway 1980, 61). The disaster in the desert was also an important factor in the failure of President Carter to gain re-election in 1980. It showed that the inability of the three services to cooperate carried high political costs for civilian elites who tried to wield military power. What it reinforced was a growing determination within these political elite circles and inside elements of the US military to turn towards the joint pathway.

The final event was Operation Urgent Fury or the invasion of Grenada in 1983. US military involvement in what was once a British dependency in the Caribbean stemmed from a bloody coup in 1983 on the island that promised a deepening of the Marxist orientation of the existing government, that which already had good links with Cuba. The problem for the United States was the significant number of US citizens (students) enrolled at St. George's Medical School. Consequently, President Reagan tasked the US military with not only rescuing the US students but also invading Grenada at short notice literally within a matter of days. Operation Urgent Fury demonstrated that the three services plus their Special Forces still struggled to cooperate effectively together. As one former member of the Senate Armed Forces Committee staff at the time has recently remarked,

The sense that the Defense Department had structural problems was reinforced by Operation Urgent Fury, when the United States invaded the tiny Caribbean nation of Grenada. The Marine Corps and the Army effectively divided the island and conducted parallel operations in isolation. Commanders couldn't communicate because radios were not interoperable. Stories circulated about military officers using commercial telephones to contact each other and report back (Hamre 2016).

Operation Urgent Fury was ultimately a success for the Reagan administration, but a costly one with 19 dead and 116 wounded (Cole 1997, 62). Of more significance was

the “impetus” and strength it gave for significant reform of the armed forces through the Goldwater-Nichols Act of 1986 “to strengthen demand for joint capabilities” (Hamre 2016) and create structural changes within the Department of Defense and the armed forces to create better interoperability. It is of note that political elites in the United States were forced to use law to initiate such profound changes in the face of much institutional opposition within the armed services themselves (Hamre 2016). Three major military operations that all suffered either outright failure or glaring shortcomings despite a successful outcome were core drivers, especially within influential political elites, to force the three US armed services to work together in a more effective way.

The move from combined operations/cooperation to interoperability/joint operations has not been an easy one for the US armed forces. For the most powerful armed services in the world with strong cultures and identities, the shift towards greater interoperability raised awkward questions about independence and leadership such as who commands in a joint operation, the most powerful or the most appropriate for the mission. It can be argued that in many ways these tensions in joint operations remain because the service cultures/identities are largely unaffected by it and often just contribute forces to a joint command. A good example of perhaps one of the first joint entities in the United States was the formation of Central Command (CENTCOM) in 1983. CENTCOM is a permanent joint command, but with limitations because “only the command arrangement was truly joint” (Finlan 2014, 33) and its fighting forces are drawn from the army, navy and air force. Interestingly, this political solution to an internal national defence problem has generated far broader implications outside of the United States than the authors of the Goldwater-Nichols Act ever imagined. The drive for greater interoperability and cooperation in the United States has impacted hugely on international partners. It has greatly influenced the development of the “joint approach” in the armed forces of other nations that have emulated or copied them with little grasp that the idea stemmed from frustrated civilian elites who were forced to intervene in military affairs to improve effectiveness. Joint operations have morphed and evolved over time in the period between the 1980s and 2021 from idea to concept and now form a type of reality within military organisations. It has matured into an assumption today or a “taken for granted” notion that exists within international and national military spaces without much critical reflection. It urgently requires deep intellectual engagement to excavate possible diverse meanings and practical contradictions underpinning joint operations in various armed forces. The following parts offer two distinct perspectives from which to interrogate and question the commonsensical status that joint operations now carry in different contexts.

Perspective 2: reflexivity

A reflexive scholarly engagement with “joint operations”

As shown in the above, an idea of “jointness” and a stated need of greater “interoperability” between the armed services have come to dominate current military discourses about operations and military success (e.g. Woodall 2000; Jakobsen and Rynning 2019). Indeed, the concept of “joint operations” constitutes a reality within many Western military organizations – it has reached a status of common sense, as if it

had indeed always “been there”. Such taken for grantedness brings with it many epistemic pitfalls. As the philosopher Susanne K. Langer once wrote: ideas and concepts that have grown commonsensical can be seen as lights “that illuminat[e] presences which simply had no form for us before the light fell on them. We turn the light here, there, and everywhere, and the limits of thought recede before it” (Langer 1979, 8). Differently put, the concept of “joint operations” in military organizations is an example of what Pierre Bourdieu and Loïc Wacquant (1999, 41, emphasis in original) would call *commonplaces* – that is, knowledges, theses, and propositions “with which one argues about which one does not argue”. The risks with such a fading of critical interrogations are apparent, and this for armed forces as well as for scholars researching military power.

The concept of “reflexivity” offers one way to counter, or at least abate, these epistemic pitfalls. While reflexive practices vary greatly, the basic idea is that reflexivity refers to a “bending” back of knowledge, including ideas, concepts, and theories (Lynch 2000). Reflexivity thus puts the question of knowledge and related terms such as ideas, concepts, and theories in focus. Reflexivity is a quest to illuminate and disentangle how knowledge is produced, under what social, material, political, and economic conditions, and with what effects (Cunliffe 2003; Eagleton-Pierce 2011).

Scholars of military affairs have recently and increasingly come to emphasise the need of a reflexive posture (e.g. Higate and Cameron 2006; Carreiras and Caetano 2016). One oft-mentioned reason is that research on military power and military operations raises difficult questions about scholarly access, positionality, and autonomy (e.g. Dyvik 2016; Gray 2016). Interestingly, reflexivity has been embraced recently also by many Western military organizations themselves. Following operational experiences made in Afghanistan (Operation Enduring Freedom) and Iraq (Operation Iraqi Freedom) – particularly identified weaknesses in militaries’ abilities to “know” complex problems and dynamic operational environments (Zweibelson 2015; Jackson 2017) – reflexivity has been advanced in some military circles (particularly in the US, Canada, Australia, and Israel) as a way to “condition, reinvigorate, and institutionalize military epistemic changes” (Danielsson 2020, 4; see examples in Papparone 2013; Zweibelson 2015; Martin 2017; Mitchell 2017; Philippe and Dufort 2017).

Reflexivity and tensions between scholarly autonomy and relevance

The present “reflexive moment” thus makes military affairs ripe for deeper scholarly interrogations of tenacious conceptual commonplaces, not least then the concept of joint operations. Indeed, the ways in which “joint operations” originated in the US and spread globally with relative ease – as mentioned without much understanding of or consideration to the particular circumstances in which this idea was advanced on American soil – propels a need to gain a better scholarly understanding of the potentially varied births, meanings, and roles of this concept in constituting military practices also elsewhere. Conceptual travel and conceptual “imports-exports” are never neutral and unproblematic processes, but rather constantly marked by forces of translation and transformation of the travelling concepts (for an adjacent example of this, see for instance Piero C. Leirner (2016) on the military’s import and reductionist use of the concept of “culture”). This means that taken for granted conceptual commonplaces risk

presupposing a kind of “immediate knowledge” that may hide such transformations of the concept and divergent meanings and practices (cf. Pierre and Wacquant 1992, 235).

In order to disentangle and better understand the discursive and practical conditions of joint operations in Western armed forces, then, analyses of the historical conditions of possibility and particular political-military-scholarly epistemic and practical interactions that made joint operations a reality in particular militaries are called for. In other words, such analyses would include an understanding of the positions and roles of academics in these national and global ‘military knowledge markets’ through which concepts and ideas travel and are transformed (cf. Libel 2019). As may be inferred, however, any such inquiry naturally raises questions about scholarly autonomy. Trine Villumsen Berling and Christian Bueger argue that scholarly autonomy is a prerequisite for the production of thorough scientific knowledge. At the same time, (legitimate) calls for relevance of scholarly knowledge involves the risk that what is considered to be relevant research is that which does not question but legitimise commonly shared “truths”, perspectives, and “taken-for-granted power structures in society” (Villumsen Berling and Bueger 2017, 333, 338). Clearly, a dilemma arises when it comes to researching and questioning military commonplaces such as the concept of joint operations.

A reflexive analysis is commonly advanced as a way for scholars to cope with (rather than resolve) the tension between autonomy and relevance (Villumsen Berling and Bueger 2017, 333). In the scholarly literature on military power, two main reflexive strategies may be discerned (Carreiras and Caetano 2016). The first focuses on the scholarly research process, and how factors both internal and external to this process – for example the researcher’s own military experiences, gender, and/or social values – shape the knowledge produced (e.g. Ben-Ari 2014; Bulmer and Jackson 2016). The second strategy focuses on the dynamics and epistemic effects of the broader scientific field on the knowledge produced (e.g. Quellet 2005; Heineken 2016).

While both of these strategies are necessary in analyses that seek to break with military conceptual commonplaces and their immediate knowledges, they are not enough. A break with military commonplaces requires a simultaneous understanding of the potential interactions between scholars and military and political actors in advancing particular concepts for the military domain *and* of the epistemic distinctions between scholarly and military knowledges. As Anna Danielsson (2020) explains in a recent article, Pierre Bourdieu’s take on reflexivity is fruitful as a complementary to existing ones in the literature on military affairs, as it directly targets what makes scholarly produced knowledge distinct from other types of knowledge while taking into account potential interactions between differently produced knowledges (e.g. Bourdieu 2000, 2004). Indeed, for Bourdieu careful attention to epistemic interactions amid distinctions is a prerequisite of scholarly relevance. Such a reflexive analysis thus helps to balance autonomy and relevance, detachment and involvement, while at the same time demonstrating the specificity of scholarly knowledge and its potentiality to challenge state agencies, organisations, and military institutions in the production of categories and concepts through which reality is constructed (Pierre and Wacquant 1992). That said, this type of reflexive analysis of joint operations is precisely not only of scholastic interest and relevance. As it interrogates the political-military-scholarly epistemic and practical interactions that have made the concept of joint operations a more or less unquestioned reality within various armed forces, it offers militaries a way to break with the US-

dominated epistemic frames that are inherent to the concept. This opens up for alternative thinking and for the development of joint meanings and practices better suited to particular national circumstances.

Perspective 3: Sweden, joint operations and NATO

Sweden is a good case study of the concrete ideational impact of joint operations over a forty year period of time. It was affected by the move towards joint operations in the United States as much as any other European power, even though it was, and remains, not a member of NATO. The Swedish Armed Forces have always had a forward-looking orientation that is evident from their distinguished military history, not least in the Thirty Years War under Gustavus Adolphus known as “the father of modern war” (Wilson 2018, 110). It is unsurprising that it has embraced the concept with enthusiasm. Joint operations in the modern age dominates contemporary warfare and connotes “activities, operations, organizations, etc., in which elements of two or more [services] participates” to accomplish common operational objectives (U.S. DoD 2020, 113). In plain language, Air Force, Army, Navy, Marines and Special Forces operate in their respective domains, coordinated by a dedicated Joint Force Commander who pursues joint military operations at operational and tactical levels of war. Joint military operations is an institutionalised concept.

The Goldwater–Nichols Department of Defense Reorganization Act of 1986 served to institutionalise it in the United States by making joint assignments an essential step in promotion to general and flag rank (Carafano 2017). NATO’s Command Structure – centring on two operational-level Joint Force Commands and three tactical-level commands for air, land, and sea operations (NATO 2018) – has effectively institutionalised joint military operations in Europe. Successful joint military operations depend on successful integration and synchronisation of various elements of combat power into a joint military force whose fighting capability is larger than the sum of its components. This in turn requires institutionalised principles on how this force intends to fight. As Posen (2016, 160) notes, Joint Doctrine provides a concept guiding the joint military force in its preparations on how to fight and for what purpose – principles that serve to reduce “organizational uncertainty”. By presenting purpose-driven content, it “provides a source of cohesion when the fighting starts”. Joint Doctrine sets priorities and directs the efforts needed by military commanders and staff to implement a conceptual framework termed Operational Art. Commanders apply this cognitive approach to manage the uncertain and complex operational environment in which they employ a joint military force (NATO 2019, 1–3; U.S. JCS 2018, II–3).

A brief background on Swedish joint operations

The move towards “joint operations” has been as difficult for Sweden as it has for the United States and its NATO partners. The Army has traditionally held most military manpower in the Swedish Armed Forces; the Air Force has been its most technically specialized service; while the Navy has remained its smallest service. During the Cold War, the Air Force and the Navy maintained higher readiness levels than the Army, which was dependent on a parliamentary decision on mobilization. At this time, Swedish

based its defence planning on two main scenarios: a Soviet invasion by land and air assault over its northern land border; or an amphibious invasion on its eastern coast (Agrell 2010, 27–41). Both scenarios required Soviet troop concentrations that would provide ample forewarning. A surprise attack scenario was added in the early 1980s as a lesson learned from the Soviet submarine intrusions in Swedish territorial waters in 1981 and 1982. While the main scenarios provided little impetus for joint operations, the new scenario prompted coordination training between fighter jets and Navy missile craft.²

Interservice rivalry plagued the Swedish Armed Forces throughout the Cold War (Åselius 2005, 32–33, 35–36). Officers were socialized into belonging to their service from the outset of their careers, which shaped their professional identities. When posted at the Supreme Commander's headquarters, they commonly represented the interests of their respective services rather than that of the headquarters. Interservice rivalry materialised in fierce structured competition over economic resources, primarily between the Army and the Air Force. Åselius pointedly uses the term “cultural war” to describe the ideologically biased struggle in the 1970s between Army representatives advocating a decentralized “cellular defence” by 40 brigades of soldiers equipped with hand-held missiles, and Air Force representatives promoting a “periphery defence” capable of engaging the enemy in “a decisive battle in the early stage of a conflict”. The Army gained political support by coining the term territorial ‘people’s defence’ and ended up as the winner. Sweden thus maintained a mobilized Army of 850,000 soldiers capable of local defence operations in the 1980s, while the Air Force saw shrinking number of fighter jets as their acquisition costs increased. The Navy adapted to the new limitations from its downsized vessels by implementing a strategy of “coastal defense” from positions in the archipelago.

Sweden joined NATO's *Partnership for Peace* programme in 1994 and its *Euro-Atlantic Partnership Council* in 1997 (NATO 2021). Henceforth, all three services contributed to various international peace-support operations, including a battalion-size contribution to the NATO-led peacekeeping force in Bosnia and Herzegovina in 1995 and its peacekeeping force in Kosovo from 1999. In 2003, the Swedish Armed Forces entered a longstanding commitment to NATO's *International Security Assistance Force* in Afghanistan. However, these contributions were *combined* rather than *joint* operations. Against this background, it comes as no surprise that it was not until 2005 that the Swedish Armed Forces published its very first doctrine on joint operations. This was a small yet important step to engage with the concept of joint operations through a tactical lens, outlining a theoretical model based on the concept of maneuver warfare – in turn enabled by mission command (SwAF 2005, 67, 71). Recently, the Swedish Armed Forces adopted a more mature approach to joint operations.

Explaining Sweden's “cooperative” turn towards joint operations through alliance shelter theory

Why did Sweden choose the joint operations pathway? Alliance shelter theory has significant explanatory power to explain this “cooperative turn” and represents a suitable tool to examine the strategic rationale behind the Swedish Armed Forces decision to revise its joint doctrine in recent years. Bailes et al. (2016) formulated this theory with the aim of providing a more nuanced tool than traditional alliance theory

(see e.g. Waltz 2010[1979]; Walt 1987) to explain small state alignment behaviour, since the latter assigns priority to explaining great power behaviour. While acknowledging the vulnerability of small states in the international system related to their structural weaknesses in terms of limited economic and military power or poor administrative capacity, the theory recognises the importance of diplomatic capacity, international reputation and appeal to global public opinion. In addition to these external measures aimed at enhancing a small state's ability to survive and exert political influence, it accentuates the role of internal measures to strengthen societal unity and resilience, administrative competence and solid national economic management (Bailes et al. 2016, 10–13).

Alliance shelter theory posits that small states seek “political, economic, and societal shelter” from external threats in the international system by making strategic “arrangements” (i.e. aligning themselves) with “a larger, neighbouring state/s and/or with regional and international organisation/s” to “alleviate the inherent vulnerabilities of being small” (Bailes et al. 2016, 9–13). However, as opposed to the concept of “bandwagoning” – i.e. then weaker states align themselves with adversarial powers for offensive (“to divide the spoils”) or defensive (appeasing the adversarial power) reasons, as elaborated on by Walt 1987, 126, 163) and Walt (1987, 21) – small states are “functionally different” units whose alignment logic differs from that of great powers. Small states align themselves with stronger entities in the international system to seek shelter, sometimes at considerable cost. However, small states who do not concern themselves with relative gains in their alliance relationships may “benefit disproportionately from international cooperation”. Of particular importance here is their need for tangible diplomatic and/or military support when needed such as political shelter. To compensate for their structural weaknesses and exploit their strengths, small states tend to prefer multilateral to bilateral international relationships (Bailes et al. 2016, 9–15).

Sweden and its geostrategic environment

Sweden also chose the “cooperation pathway” to cope with the deteriorating security situation through involvement in a wide array of international defence cooperation. Here, the Nordic Defense Cooperation (NORDEF) served as a vehicle for coordinated capability development. Moreover, Sweden joined the UK-led Joint Expeditionary Force in 2017, the German-led Framework Nations Concept group in 2018 and the French-led European Intervention Initiative in 2019 (Lundqvist 2020, 25). The Swedish Government eventually decided to ramp up defence spending by 40% over four years in its 2021–2025 defence bill, including upgrades of the navy and the air force as well as the reestablishment of one air wing and five regiments (Government Offices of Sweden 2020a; Igityan 2020).

Sweden's bilateral defence cooperation with Finland is the most far-reaching. Their initial focus on combined naval operations under peace-time conditions in 2014 widened in 2018 to include cooperation at “all levels of the Participants defence, the policy and military levels including the strategic, operational and tactical level” with “no predetermined limits” (Lundqvist and Widen 2016, 359–360; Government Offices of Sweden 2018a, 3–4). Their current emphasis on “creating prerequisites for combined joint military action and operations in all situations” is readily explained by the fact that Russia's Baltic Fleet is a capable operational strategic unit of its navy. The annual 2019

and 2020 Okeanskiy Shchit exercises have illustrated its ability to launch the full range of offensive and defensive operations across contested operational domains – i.e. air, land, maritime, space and cyber – in the Baltic Sea Region (McDermott 2019; Igityan 2020). To create the prerequisites for combined joint action, Sweden and Finland must build interoperability. This insight was conveyed already in their May 2014 Action Plan for Deepened Defence Cooperation, although bilateral cooperation at the time was considered merely as a “supplement [of] other multinational cooperation” (Lundqvist and Widen 2016, 359–360).

Sweden’s emphasis on “combined operations” with Finland or utilising the finite military capabilities of two small states in cooperation may improve military effectiveness and will increase the geostrategic depth of their territorial defence, but it has limits. They remain vulnerable to a massive armed attack by a great regional power so Sweden and Finland are still dependent on wider international defence cooperation to ensure their national security at the upper rungs of the conflict ladder. To cater for “capacity to receive external assistance” and enable joint training, these non-aligned states jointly signed Memorandums of Understanding (MoUs) on Host Nation Support with NATO and became Enhanced Opportunities Partners at the 2014 Wales Summit (Pyykönen 2016, 93). This opened up for Finnish and Swedish contributions to the NATO Response Force and regular security consultations, while they accepted the invitation to NATO’s wider Interoperability Platform. Sweden and Finland took important initial steps on joint air surveillance already in 2010 by signing MoUs with NATO on operational Air Situation Data Exchange in parts of the European Arctic and the Baltic Sea Region (Engvall et al. 2018, 42–44). This system is compatible with the more recent Swedish-Finnish Air Picture Exchange system. However, navies have once again proved themselves capable of spear-heading defence and security cooperation. Sweden and Finland operate the *Sea Surveillance Cooperation Finland-Sweden* system (SUCFIS) in the Baltic Sea since 2006, exchanging classified target data in the Baltic Sea through an interface between their autonomous sea surveillance systems (Widen and Widen 2016, 358). Simply put, shared situation awareness, information quality and interoperability through networked command and control systems are imperative to plan and execute combined joint operations – whether they are initiated by NATO, Finland or Sweden.

The harsh warnings delivered by Russia in 2016 illustrate the political risks of Sweden’s rapprochement with NATO and the United States (Winiarski 2016). However, its shelter-seeking strategy is measured and based on the insight that the United States and key NATO members largely share its regional security interests. This is apparent in the 2018 trilateral Statement of Intent (SOI) on defence cooperation between Sweden, Finland and the United States. The document outlines the threefold aim of strengthening “transatlantic links, increase security in northern Europe, and build interoperability between the United States and two of its most capable and like-minded partners” (Government Offices of Sweden 2018b). Likewise, the September 2020 trilateral SOI between Finland, Norway and Sweden under the broader NORDEFECO structure introduce common strategic and operations planning “in the northern parts of Finland, Norway and Sweden [...] and improved interoperability between our armed forces that enable common military action”. To this end, the parties established trilateral steering groups for policy and strategic planning (Government Offices of Sweden 2020b). These agreements illustrate their mutual interdependence. So do NATO’s intensified military

planning and increasingly advanced regional exercises that involve Sweden and Finland. The latter states, who are situated at a geostrategic crossroads (Lundqvist 2017, 68), may prove decisive in facilitating military action by the United States and NATO in the Baltic Sea Region or in the European Arctic. To reap strategic advantages their armed forces must be fully interoperable at the operational and tactical levels of command, regardless of NATO membership.

Sweden, known for its former policy of neutrality in armed conflicts, is a good case of the recent turn towards joint military operations among armed forces in the West because its contemporary security problems requires a collective response. It necessitates interoperability and explains its its growing strategic alignment with Finland, NATO, the United States and most recently Norway. The reason why the Swedish Armed Forces is devoted to implementing its new Joint Operations Doctrine is because its needs to forge common understanding of today's command problem among its staff. The doctrine is a normative plan on how to command national and combined joint military forces on Swedish territory or in its near abroad in peace, crisis and war (SwAF 2020). Regional security is a problem shared, imperilled by a common adversary seeking to "restrict friendly maneuver across all domains in both operations below armed conflict and in armed conflict" (U.S. TRADOC 2017, 1). By building combined joint capabilities with partners, Sweden seeks to offset its structural weaknesses to survive and prosper in a challenging strategic context, shaped by an interplay of regional and global security dynamics. This also explains why it embraces a reinvigorated total defence concept to create resilience, not least against hybrid warfare.

Conclusion

A critical engagement with the idea of joint operations has many advantages. It fractures the seeming stability of the thin intellectual ice covering joint operations and reveals the deep-rooted fissures and pressures inherent in the idea and its forced implementation within the US military services by dissatisfied civilian political elites who were tired of recurring military failure through non-cooperation. The rendering of the joint operations concept by the American armed forces, of acceptance but not wholehearted adoption, evident in the shallow purchase of the idea in military culture suggests a flawed development process. This has profound international consequences because of the widespread emulation process by militaries all over the world in an attempt to be more compatible with the United States and its major alliance structures. It could also explain why tensions about the concept are apparent in other highly advanced military forces such as those in the United Kingdom and suggests that the idea of joint operations needs urgent re-evaluation. A critical academic gaze creates an awareness of the conceptual fragility of joint operations and how it needs sustained, intellectually driven perspectives to excavate it more fully. It is under-researched, lacks rigorous intellectual investigation and an established academic literature to support the conceptual growth of this highly influential idea in military circles. It is remarkable to consider that while there has been a significant discussion on the topic of civilian interference in military matters (Posen 1984; Kier 1997) and its consequences, not least in terms of doctrine, the concept of joint operations has been overlooked and is rarely acknowledged as being part of this debate. Arguably, it is perhaps the most important

part of the conversation in the twenty-first century. Unlike the doctrine debates of the past and their impact during the interwar period and the Second World War, joint operations affect the present and the future with barely a scrap of weighty intellectual thought to support them. It needs deep knowledge-based engagement because warfare today and tomorrow in the West rests on its thin conceptual soil. The transition from cooperation to interoperability continues to be tension-wracked because the idea of joint operations has not fully intellectually developed. It remains mitigated through translation by military organisations in which the preservation of individual service culture takes primacy over the development of joint. Consequently, joint operations have not fulfilled their potential and attention is already turning in some countries such as Britain towards the more radical idea of integrated operations that has much more profound cultural implications for the armed services.

Encouraging more research in this area is perhaps one part of the solution through deepening the conceptual exploration of cooperation, interoperability and integration within and between armed forces. Critically engaging with the discourse of joint operations from a variety of academic perspectives is a necessary step in this intellectual evolution. Interdisciplinary approaches bring much to the intellectual debate and shake up accepted truths and wisdom to uncover tensions, flaws and shortcomings. Reflexivity is one pathway to interrogate the stability of concepts and constructs involved in joint operations and apply a critical lens to commonplaces or assumed notions that often on close inspection have weak foundations. It also offers a means to manage the inherent contradictions within the ideas marketplace that characterizes military environments in which new terms and ideas compete for adoption. Sweden, albeit a non-NATO ally, has been greatly affected by the ideas emanating from the United States about joint operations since the 1980s and provides a good case study of the power of military emulation internationally. It has stimulated the same focus in defence educational environments on joint operations in Sweden as has occurred in the United States and encouraged the development of a common joint operations doctrine for the armed forces. The concept of joint operations has been enthusiastically embraced by Sweden, but it suffers from the same frailties such as weak intellectual foundations and limited impact on military culture that the armed forces are trying to address. Without significant engagement and development, there is a great risk that the concept and practice of joint operations will never satisfy the ambition of civilian political elites: to improve the interoperability and effectiveness of the armed forces in combat and to make the aggregate more powerful than the separate parts. Equally, its practice may continue to be sub-optimal and, in the face of peer-competitor warfare in the future, these conceptual tensions, weak intellectual foundations and material shortcomings may prove to be highly deleterious to military effectiveness.

Notes

1. The US Taskforce assigned to the mission formulated several options to rescue the Marines who survived several days before being captured and executed, but the rescue plan was cancelled on the orders of the Ford administration.

2. E.g. the annual exercise Vänernövningen.

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