

Small-State Perspectives on Learning, Improvement, and Institutionalization: A Case Study

By Tone Danielsen & Sigmund Valaker

Military institutions appear rather rigid. They have a traditional “stovepipe structure” from the tactical to the strategic level, which restricts the flow of information, people, and resources within the hierarchical organization to vertical lines of control. Traditionally, the system lacks flexibility and to some degree weakens the incentive for nurturing contacts between the services, as well as between military and civilian institutions. Military institutions are not organized as integrated wholes, but as distinct entities (Smith, 2005). Military personnel are trained and educated in one service or branch, gain a strong service identity demonstrated daily through their uniform, and find their career and promotions mainly within their original service. Despite this traditional “stovepipe structure”, military operations in the global era are mainly *joint* – meaning several services working together. But in Norway there is no military educational institution, think tank, or other designated entity with specific responsibility for developing or improving joint capabilities.

There are always small milieus with dedicated personnel working to improve joint capabilities. This article describes and discusses how Norwegian military personnel cooperated, developed, and made decisions on joint processes – both formally and informally. This article provides thick descriptions of how learning and changes evolve in a small community of practice. This is a case study which descriptively explains how a community of practice evolved, how people learned, negotiated, and struggled through participation in several arenas, interpreted key concepts and doctrine, improved their practices, and aimed to institutionalize these changes. It is not an article on how these processes *ought* to be conducted according to accepted doctrine, structure, or theoretical models – it is about how things were *actually* done.

This article describes how changes and improvement of a joint capability played together in four different arenas – normally described and analyzed separately. It describes the process of developing a new policy and directive, how new practices were developed during exercises, how seminars worked for sharing ideas and information between personnel at all levels and services, and how a few handfuls of well-educated personnel in small communities can make a difference (Bateson, 1979). The arenas for learning and improving were closely intertwined. This article analyzes the case holistically, looking at how the macro-, meso-, and micro-levels are always in play at the same time: the international political changes affect national institutions, which give directions to individuals. It also works the other way round: practices and actions at the micro-level change procedures and policies in institutions and can have strategic effects at the macro-level.

Over a period of four years we observed changes and improvement: the personnel in the community of practice gained new knowledge, awareness, and experience. When we started, we heard time and again “This is not something new, we did this back in this or that mission as well – a decade ago”. But a decade ago the knowledge seemed to stay in the team – or in “one-man-deep team” as they called it. Throughout this process, the systematic, thorough work and persistence from actors at all levels and services in many different arenas, the knowledge was shared in steering documents, exercises, academic papers, and seminars. By doing this, new discourses and practices became institutionalized.

Size matters. Norway is a wealthy country, one of the richest in the world. It is well resourced and can be seen as having high status and power relative to its size.¹ However, in real terms, Norway is a small nation with only 5.4 million citizens. The Norwegian Armed Forces have 15 800 regulars plus 7 000 conscripts.² The entire community of practice for this joint capability is small – the core was less than a hundred people. When the members in the community of practice say “we know everyone”, it is not a figure of speech – it is a fact. Changes can be made faster and often differently in a small state’s military, because there are *de facto* very few people involved, and the personnel are used to working jointly.

The first section of this article contextualizes the case and the actors. The second section provides the background on the research project, the methodological challenges encountered and the theoretical framework. Then we describe the four different arenas discussed in this article: the making of formal steering documents, exercises as the main arena where the practical work on developing procedures and testing new technology took place, seminars as an arena for providing information, discussing, and strengthening networks, and how a few key personnel gained their Master’s degrees and by that contributed substantially to the community of practice. The concluding remarks discuss the big picture – a picture we could only obtain by close cooperation with military personnel at all levels, being part of the community of practice, running the research project in a rather unconventional way and over a long time.

The Context: Joint Targeting Process and Community of Practice

The focus in this article is on how learning and improving proceed in military institutions’ everyday life. By ‘everyday life’ we do not mean *every* day or every aspect of military life, but rather ordinary activities conducted when the personnel are not deployed in international operations. This includes exercises, training, experimentation on new things and concepts, courses, seminars, and conferences. So, by everyday life we mean the

¹ Carvalho & Neumann, 2015

² Norway has a one-year compulsory military service, dating back to 1854 and enshrined in the Constitution. The Parliament introduced gender-neutral conscription in 2015, which made Norway the first in NATO to do so. Since the end of the Cold War, the required number of conscripts has decreased substantially. Even though only 10-12 percent of total cohorts do their military service today, conscription has been, and still is, regarded as a tie between the people and the military. It is perceived as a duty and is still supported by Norwegians. Young men and women compete today to do their service, because in many branches in Norwegian business, to have served in the military is highly regarded. Conscription gives the Norwegian Armed Forces access to youths from all levels and classes of society, which most nations do not have.

kind of ordinary duty and preparation for operations that is common to most military personnel. This is a case study. It is *not* an exhaustive description of what the Norwegian Armed Forces can or cannot do, alone or with allies.

The context for this article is the process of re-implementing the Joint Targeting Process in the Norwegian Armed Forces. All levels in the military hierarchy have been part of this process: The Defence Staff at strategic level, the national joint headquarters (NJHQ) at operational level, and the different services at tactical level commands. Personnel from the Army, Navy, Air Force, and Special Operations Forces have jointly contributed to different parts of the process along the way.

According to NATO doctrine, the “*joint targeting process links strategic-level direction and guidance with tactical targeting activities through the operational-level targeting cycle in a focused and systemic manner to create specific effects to achieve military objectives and attain the desired end-state*” (AJP 3.9, NATO, 2016). The joint targeting cycle is visualized in the Figure 1:

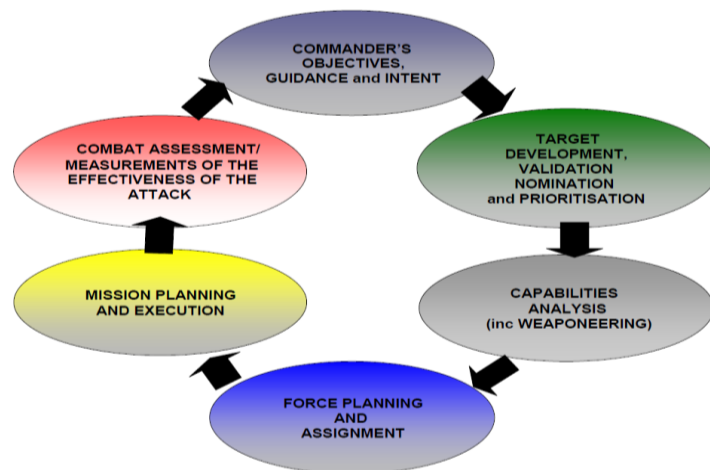


Figure 1: Joint Targeting Cycle (NATO AJP 3.9)

The joint targeting cycle is a vital part of military planning and operations. It is a top-down process. Strategic aims, guidance, and target sets are approved at the strategic level. These are operationalized at the joint headquarters and executed by the tactical commands. Then battle damage assessment is done and fed back into the loop. Designations of targets are mostly done at the tactical level. At the operational level, NJHQ, these are jointly prioritized.

ed to gain the desired strategic effect. Targets are approved at operational or strategic level – depending on the collateral damage estimation and the sensitivity of the target and rules of engagement. Joint targeting includes both lethal and non-lethal effects.

Commanders and their staff apply military strategy and tactics – “the art of war” – to attain the desired end-state. Military strategy is the direction and use of force for the purposes of policy, as decided by politicians. While tactics are about military action in

combat, strategy is about the consequences of that behaviour (Gray, 2015, p.43). All NATO allies follow the same policies and doctrines. It is often taken for granted that all allied nations and their personnel attending international combined joint operations follow the doctrine. They do, but there is always a national “filter”, and it is vital to be aware of the differences and how the doctrine is interpreted and practised by different nations.

This case study describes and discusses how the re-implementing of the joint targeting process worked, how things were interpreted and conducted in a Norwegian context, and how military practices and discourses are contextualized nationally as well as locally. This article is not an introduction to how the joint targeting cycle *ought* to be done according to the doctrine – it is descriptive, not normative. The focus is on the people contributing to this process. How they struggle, negotiate, learn, develop, change, and innovate – in the context of social relationships, in the flux of personnel, missions, reorganization, and changing realities that constitute everyday life in a military organization. The descriptions provide new insight into and understanding of how the processes played out. This is a case study, but the story sheds light on recognizable patterns in how military personnel make sense of changing demands and improvements, and why diversity is vital to evolve and thinking outside the box (Danielsen 2019).

Using this case as a context involves some challenges. Firstly, in-depth information on national joint targeting processes and operational details are classified. Therefore, most articles on joint targeting focus on its legal aspects or evaluate historic cases. Due to the sensitivity of the topic, prior research focuses mainly on reified aspects, not how the process develops as new practices.³ Our focus is the cultural aspects, and on how people work to improve and implement new practices and discourses in their everyday life. While joint targeting in operations is a top-down process, the processes of developing new practices were mainly bottom-up initiatives.

Secondly, key players at tactical level in this process came from *strategic capabilities* – tactical capacities that can have strategic effects, such as aircraft squadrons and special operations forces (SOF). The “who is training on which scenarios” is sensitive information. Descriptions from the exercises in this article will therefore not go into detail on who trained on what. It is, however, a generally accepted – and thus an academic, comparative point - that globally the SOF community has over the years demonstrated itself to be in the forefront, not only in operations but also when it comes to innovations in technology and new concepts.⁴ Nurturing creativity and initiative at the lowest level is a characteristic of the Norwegian SOF (NORSOF) milieu as well.⁵

What the public, and most researchers, learn about SOF is about the 10 percent of kinetic operations that go high end and high order.⁶ While there will always be parts of

³ Gill, 2016 ; Osinga & Roorda, 2016.

⁴ McRaven, 1995; Simons, 1997; Spulak, 2010; Eriksson & Pettersson, 2017; Turnley, Ben-Ari & Michael, 2018.

⁵ Danielsen & Valaker, 2009; Danielsen, 2018; Danielsen, 2018b.

⁶ Resteigne, 2018, p.152

military activities which have to remain secret for operational security reasons, not all such activities require secrecy. Qualitative cultural analyses of how services work jointly in small nations, organizational changes, and improvement are not subjects for the national Security Acts.

Today, dedicated personnel at all command levels work on joint targeting in Norway. The first joint targeting section was established at the headquarters (NJHQ). In its first years, this section struggled to find its place and role, but it has now grown to be a coordinating hub for activities in the growing joint targeting community of practice. In 2015 we – the two authors – were invited by the (then) head of the section to observe their processes. We got funding from the Norwegian Armed Forces Concept Development and Experimentation (CD&E) Council for a project on “Communication and decision-making in the joint targeting process”.⁷ Developing the joint targeting process was a priority at that time. The work on building up this joint capacity was led by NJHQ. It involved the tactical commands, and our project became part of this process – sponsored by the NJHQ Commander. This was the guidance and directions we got from the command team of NJHQ:

Hi,

I would like you to focus on:

- Are there any documents lacking, such as directives, terms of reference, or SOPs [standard operating procedures]? If so, I would like you to support the process.
- Is the existing organization expedient?
- Are their gaps in the personnel’s competence?
- Are we utilizing our toolbox well enough, or do we need new technology (just give me a moderate assessment)?

Best,

X [first name]

Supporting the process of writing documents, field working during exercises, mapping the organizational structure, supervising students, and creating seminars to fill the competence gaps became the core of our research project. Technology is important, but technology as such is not a central part of this article.

Map and Terrain – Theory and Methodology

This study is based on a four-year research project “in the wild” (Hutchins, 1995) – research among real people, doing their everyday jobs, not a controlled experiment in a laboratory. This methodology always has the potential to come up with unexpected and unforeseen issues.

⁷ Initially, the research project got funding from the CD&E council for a one-year full-time equivalent position for two persons, and then it got extended for one more year. We worked half-time on this project, and the rest of the time on related issues – and so the funding was “stretched” over four years. This is to underline that this has been a small and limited research activity.

Social science researchers must account for their positionalities and spell out their methodological tools, because the reliability of research depends on trust in the methodology (Ben-Ari, 1998, p.130). Doing research in a small state's armed forces such as the Norwegian, and an even smaller community of practice, allowed us to utilize fieldwork as a fruitful methodology. We have been participant observers, and, to be fair, we have at times been participating more than we have been observing – because we became part of the community of practice. We have worked on different aspects of joint operations for two decades and knew both the map and the terrain quite well before we started. We did our best to stay aware of our own biases; we were curious, listened to the stories told and what they tell, observed, discussed with members of the community and others throughout the entire project, and tried not to jump to conclusions.

As scientists, we take a critical stance, and the analyses are based on and bounded by the observations, discussions, and feedback we received throughout the project. In this way, this is a typical social science study of a community of practice, intended to raise questions on complex phenomena contextualized in time and space (Eriksen, 2001). While most books – and films – on the military are about war, heroes, hardships endured, and glorious battles, this article focuses on its less glorious, yet important, everyday activities.

This article highlights processes not often described empirically in research on military organizations: how dialectical processes, both top-down and bottom-up initiatives, involving key military personnel from different services along with the research team, contribute to learning, reflections, development, changes, and institutionalization. Building a community of practice including all levels and services takes time. Collectively, the joint targeting community of practice described in this case study gained new and valuable experiences over time. The inclusion of all command levels and the diversity of the community was invaluable in the innovation and improvement processes.

The military chain of command is hierarchical. As researchers we were not part of the formal military hierarchy and could therefore keep in touch with personnel at all levels. This is well known, and, due to our skills, network, and priorities, the leader of the research team was given formal responsibility by the CD&E board for coordinating all CD&E activities on joint targeting. We supported the joint targeting section at exercises, encouraged units and people to cooperate in new ways by creating meeting arenas, and overall had a stronger emphasis on written documentation than in the usual CD&E projects led by officers. Throughout this project, we gained access to key decision-makers when we needed it, got invited to exercises, gathered the entire community together in workshops and seminars, shared knowledge, discussed, and used our vast network to facilitate processes so the “right” people, branches, and units could work together.

No single grand theory can explain all aspects of everyday work life or organizational changes. Instead of being faithful to a particular theory or academic school, we have unfaithfully used parts of theories and key concepts we found fruitful to make valid analyses and provide room for the cacophony and complexity that real life offers.

Our ethnographical data is the basis for our theoretical framework and analysis, and we have worked inductively, qualitatively, comparatively, and holistically.

A concept used consistently throughout this article is “dialectic”. The analysis in this article is inspired by Gregory Bateson’s thinking on the patterns that connect people to each other and their communities in everyday life (Bateson, 1972, 1979). According to Bateson, the human mindset, as well as the mindset of institutions and structures, is adjusted by the feedback one gets from others. Bateson developed a model – looking like a zig-zag ladder – of how people learn, change, and improve throughout their lives. Learning and changes are not just an ongoing loop or iterative processes, where people try something, fail, get new information, correct, and redo. Dialectic implies a pattern of *discontinuous* steps, derived from the contact of one level with the next. Bateson discusses how form and process affect each other. We reckon that this concept of dialectic processes provides room for the complexity, changes, and growth found in any organization or community. All factors – in this case military personnel, commanders, units, communities, branches, services, and levels – were mutually “affected”. Both individuals and institutions (form) learned and developed at a higher level from the feedback and reflection they got from testing and trialling procedures and practices in exercises, seminars, and education (process).

There are multiple ways in which change in organizations can be conceptualized, and multiple theories. Van de Ven and Poole (1995) conceptualize change in organizations along four different dimensions: life cycle, teleology, evolution, and dialectics. In their concepts of life cycle and teleology, there are certain goals that either by their very nature or through prescription guide changes. Or there are evolutionary mechanisms for variations, selections, and retentions. In a dialectic mode of change however, there are differences, such as between form and process, which drive the changes. Grounded in our empirical findings, this article describes continuous oscillation between form and process. Rather than evolutionary changes, a concept of dialectical learning offer a framework to understand the changes and improvement that occurred.

In this case study different dichotomies are used: written documents *vs.* the military oral tradition, formal structures *vs.* informal communities of practice, insiders *vs.* outsiders, and researchers *vs.* military personnel to describe the patterns of cooperation and processes of self-correction, improvements, and getting to the next level. Throughout the years of the project the individuals’ mindset and skillset changed – and we describe and discuss how this had real impact. The military institution is not only a hierarchical chain of command, but also includes informal networks and communities of practice. The need for developing and improving joint capabilities is driven by closer international cooperation in our global era. These micro-, meso-, and macro-levels are nested parts of the big picture. Only by following these processes closely over time and analyzing them holistically can we identify how personnel learn, adjust, improve, and institutionalize the new practices.⁸

⁸ Riessman, 2002; George & Bennett, 2005.

On Military Culture and Structure

The initial project was to describe and discuss cooperation and decision-making in the joint targeting process. In order to make sense of a small piece of the military *structure*, it needs to be contextualized within the military *culture*: how people think, act, and communicate – and how they learn, change, and improve, and why they sometimes do not.

Military institutions are rather conservative and have long traditions on how to socialize newcomers into the culture. Military personnel are educated and trained in an institutional apprenticeship (Danielsen, 2018). Newcomers gain a military skillset and mindset – practices, discourses, and meanings are intertwined phenomena in apprenticeships.⁹ They are socialized into distinct roles, and this career-long apprenticeship gives them collective frames of reference that are recognizable in an international military culture. Categories of thought consist of organized interpretations, meaning most answers are predefined and retrievable. The knowledge inventory breaks down a vast number of tasks in life into routines, customs, and certainties, and these frames of reference disburden the individual.¹⁰ Military training and education provide personnel with a cognitive and methodological toolbox through which to interpret doctrines, concepts, mission statements, and tasks within the same frames: the military mindset and skillset. Military organizations change, but the changes are often slow because they are formed and negotiated by personnel within the same discourse, in the same communities of practice.

Most workplaces, units, and communities will claim that they are special, and in some ways they are special in their own terms. However, there are not endless ways of organizing institutions. In principle, there are three ideal models of social organization: *hierarchies*, *communities of practice*,¹¹ and *networks* (Sørhaug, 2004). Hierarchies have clear aims and tasks, and work through formal doctrines and instructions. The chain of command has legitimate positions of power and decision-making and structures the tasks. Communities of practice have both formal and informal criteria for membership. Constructive criticism and reflections fuel the dialogues – and, inside the community, the actors are equals. The term “community of practice” assumes that members of that community have different interests, make diverse contributions to activity, and hold varied viewpoints. But it also implies that participants share understandings concerning what they are doing, and what that means for themselves and for their communities.¹² Networks are informal and personal, and they are not necessarily built on common aims and values. They are based on trading of resources and are regulated by reciprocity, so personal alliances are vital. In real life, these three ideal types cross over each other.

Ideally, the military is a hierarchical meritocracy. Roles and responsibilities are defined in doctrines and instructions, and positions are earned by merit only – not traded as

⁹ Douglas, 1986; Pálsson, 1994; Sinclair, 1997; Wulff, 1998; Wacquant, 2004; Marchand, 2008.

¹⁰ Neitzel & Weltzer 2012, p.17.

¹¹ Sørhaug (2004) calls these “knowledge regimes”. What he calls an academic “collegium” in his book, we call a “community of practice” in this article.

¹² Lave & Wenger, 1991.

a valuable in a personal network. The military narrative underscores how things ought to be done “by the book”. In real life, no institution works as the ideal prescribes. People long to belong (Strathern, 1996) and join kinship-like relations such as communities of practice and networks. In real life people have friends, colleagues, and acquaintances in powerful **positions**. They use all these connections to position themselves, but most of all to get the job done in their everyday life.

In most professions, views, knowledge, and practices from outsiders are not valued as equally good or as equally important (Sinclair, 1997). In the military guild, civilian advisors and researchers are outsiders. But the membership in a community of practice is not defined through whether one wears a uniform or not. In these informal communities all categories of personnel from the defence sector with useful and crucial knowledge and skills can join. In this case study the community of practice proved to be effective because it crossed structural borders, the personnel found solutions in practical alliances, and their personal skills and position were utilized.

The Making of National Steering Documents

All NATO allies have the same steering documents.¹³ These are not tailor-made for small nations. NATO documents often state that concepts and practices ought to be adjusted to the national structure and culture, so policies and doctrines are implemented, interpreted, and operationalized in various ways in the different nations. This is well known, but the consequences and challenges it can represent in combined joint operations are not often reflected upon.

Military steering documents are statements of military dogma. Doctrines, concepts, manuals, procedures, and other written documents contain the official version of how the military institutions work. Steering documents describe how things *ought* to be, not how they are. Such documents are one way that people and institutions represent themselves to themselves, and to one another (Geertz, 1988, p.58). The military is still very much an oral culture. Written documents are often artefacts of knowledge practices.¹⁴ In the military, well-known practices are at a certain point written down in TTPs (tactics, techniques, and procedures), SOPs (standard operating procedures), and later in concepts and doctrines, and in the end they become policy. This is the “normal” way of evolving new ways of doing things. It is quite rare that written documents aim to change the skillset and mindset. Normally they *state* that they provide something new, but in reality they confirm the *status quo*. Yet, changing both skillset and mindset was intentional in this process.

The traditional military structure and practices are not set up to handle the speed of today’s military campaigns. Military planning processes are serial, starting at strategic level with the commander’s guidance and intentions, and trickle down the hierarchical

¹³ The NATO steering documents on joint targeting are, in hierarchical order: MC 471-1 *NATO Targeting Policy* (NATO, 2007), AD 80-70 *Campaign Synchronization and Targeting in ACO* (NATO, 2010), and AJP 3.9 *Joint Targeting* (NATO, 2016).

¹⁴ Garsten & Nyquist, 2013.

organization. Military planning processes are cumbersome and time-consuming. State-of-the-art technology can enable extremely fast information flows. Because a joint targeting cycle is often time-sensitive and involves all levels, the processes need to be done collaboratively, in parallel, and require good communication between the strategic, operational, and tactical levels. So, both mindset and practices had to change “to fit” the intention in the NATO doctrine. The new joint targeting capability needed to be strengthened, and new technologies needed to be utilized. When this research project started, Norway had no national policy on joint targeting. The national doctrine stated: “Norway follows the NATO doctrine”. However, national “contextualization” was not undertaken, and there were no steering documents giving strategic aims and guidance on this topic. The result was that different levels and branches used a mix and match of NATO doctrine, and big nation concepts, SOPs, and TTPs.

People need stories to put the information into perspective, and they rely a lot on stories and examples instead of rules (Klein, 2009, p.180). In this newly established community of practice, there were not many local narratives, because only a few had conducted joint targeting processes at strategic or operational level *for real*. Joint targeting was a topic that lacked the glorious stories. The few stories told were from the tactical level, and some of these were not really “in accordance with the doctrine”. There was a dialectical relationship between the stories told and the written documents. If the narrative is “we have done this so many times in X missions, we know this”, the local narratives and practices will “win” – regardless of whether those practices are according to the doctrine or not. So, it was important to get the steering documents and strategic guidance in place with clearly defined terms and concepts.

In order to develop both the individuals and the institution, knowledge must be shared. When a community becomes more than a few handfuls of people, concepts and ideas must be written down – or else only fragments of the knowledge will be shared. The process of writing is vital to accumulate and institutionalize knowledge, both internally in the community as well as for the purpose of sharing it with the rest of the armed forces. The Chief of Staff Operations at NJHQ was well aware of this. The first point in his guidance was to sort out any lack of or inadequate documents and support the process of writing new steering documents.

In spring 2017, the policy work on joint targeting started, led by the Defence Staff. Policies in Norway are joint, so representatives from different services, branches, strategic and operational levels, plus researchers, were part of the working group. The group included approximately 20 people, but not everyone attended all meetings. These were monthly and took place on Defence Staff premises in Oslo. The personnel working outside Oslo attended the meetings by VTC (video teleconferencing) on encrypted lines, so all topics could be discussed. The rank of the members in the working group ranged from major to colonel (OF 3–5). It was a small and very effective team, not only because of the size, but because the working group leader was proactive and actually led the process. He

made sure all members were heard, did their “homework”, contributed text on their areas of responsibility, kept their own chains of command informed – and so the deadlines were met. In May 2018, the *Directive on Joint Targeting* was signed by the Chief of Defence – less than a year after the work had started.

On Terminology

The main body of the directive defines roles, responsibilities, and mandates for all levels, and describes the national command and control structure. One annex gives a thorough description of the joint targeting cycle according to the NATO doctrine, and how the process is to work in the national context. The other annex is a list of definitions, terminology, and acronyms.

The main goal of military terminology is to ensure interoperability and to avoid misunderstandings during combat. Military terminology, like in all professions, contains its own specific usages. Misunderstandings in missions can be fatal. So, learning definitions, terminology, acronyms, and classification structures is important for all personnel [serving](#) in the military. However, military terms and concepts are not consistent, static, or unambiguous – they are used in different ways in different services and nations. Norwegians speak Norwegian; they are not native English speakers. Even though English is the working language in NATO, the language proficiency varies. Norwegian military pilots are educated in the USA, so most of them are fluent (with a heavy Texan accent), and English is their working language. In parts of the Army, most terms and concepts are translated into Norwegian. So, in everyday life, Norwegian military personnel communicate in a mixture of Norwegian and “Norwenglish”. The definition and interpretation of terms and concepts are not always consistent with the original English terms.

Translation is difficult. Sometimes the meaning becomes clearer, at other times it gets lost in translation. The national directive for joint targeting is called *Direktiv for metodisk målbekjemping*, which literally means “Directive for methodological targeting”. The translation of this title highlights some of the challenges. In Norwegian, the term *målbekjemping* is used for both “targeting” and “combat engagement”. So, in colloquial Norwenglish, the English term targeting is used at different levels and for different domains and concepts. This illustrates that sometimes the Norwenglish term means the same as the original English term in the NATO doctrine, while at other times it is used for something else locally – with no means of knowing which one is intended if you are not acquainted with the specific topic or task. This can be a source of confusion or misunderstanding. Secondly, the Norwegian directive has the term “methodological” (*metodisk*) in the title, but not the term “joint” (*felles*). Using the old Norwegian term *metodisk målbekjemping* is conceptually not linked to the NATO doctrine. It echoes the old mindset and be a source of conceptual misunderstandings in combined operations.

People use their experience to understand and interpret, and most of the personnel in the community of practice had experience at the tactical level only. Joint targeting is

doctrinally defined as a cycle consisting of six phases; within each phase, there are separate processes. The targeting methodology utilized by SOF at tactical level – Find, Fix, Track, Target, Engage, and Assess (F2T2EA), and Find, Fix, Finish, Exploit, Analyze, and Disseminate (F3EAD) – is part of the execution phase, meaning phase 5 in the joint targeting cycle. For most members in the community of practice, the execution phase was the part of the process they knew from their deployments. They said: “*We have always done targeting, and when several services do it together it becomes joint targeting*”. Combat missions are often conducted jointly, but this does not coincide with the process defined in NATO doctrine as *the* joint targeting cycle. Nevertheless, this was what many uniformed personnel referred to when they talked about “joint targeting”, and not the top-down joint targeting process of which F2T2EA or F3EAD are only part. Due to diverse uses of the same term, the part was mistaken for the whole.

A third issue is that the concept *målbekjemping* traditionally did not include non-lethal aims or effects. To be fair, neither does the English term “targeting”. Non-lethal effects are, however, as equally important as the lethal ones in the joint targeting cycle. But “expanding” or “redefining” terms takes time in all languages, because concepts are contextualized, negotiated, and locally filled with meaning.

The issue of semantics was addressed during the policy work. The decision to use the traditional Norwegian term rather than the English one, was made by the Chief of Defence himself. To clarify and define the terminology, the annex of the directive has four columns: the NATO acronym, the English term, the Norwegian term, and the definition of the term or description of the process.

The challenges addressed in this specific process, with semantics, translation, and interpretation, are analytically generic. Differences between individual preferences, the services’ priorities, and the institutional strategy become emphasized in these kinds of processes. A policy gives aims and directions. Allocations of resources are not merely established and implemented based on ascertainable numbers – they will be shared, interpreted, and negotiated in the changing reality of everyday life in the military organization. Words and concepts are not neutral – they are always charged with meaning and feelings. Translation and cross-cultural communication are difficult, and this became apparent in the processes of writing documents at different levels. In this case, writing worked as a tool for reflection and improvement, and made everyone involved reflect more critically about their own practices and taken-for-granted mindsets.

Insiders and Outsiders

Norway is a small country, and the distance to the top is short. In a small nation and in a small team dedicated to work on policy, people are hand-picked based on a combination of what they know and whom they know. Most officers get a new position every 3–5 years, and few have a lot of experience in developing policies. The selection process to these working groups does not have a standard procedure. The result, however, is more often than not that people who have known each other and worked together for

decades are invited. It makes the processes smooth and effective. But, people who have known each other for decades rarely challenge each other on fundamental topics and taken-for-granted truths. This working group did not include personnel from the tactical commands, except a liaison person from the Cyber Defence Force. Liaison officers from SOF or other strategic capabilities were not invited to join this policy process.

SOF literature today underlines that, globally, SOF have a highly privileged location in the domestic context, as well as in the international military nexus (King, 2018, p.283). SOF personnel around the globe are known to use their social ability to build networks with powerful stakeholders.¹⁵ Consequently, personnel in these tactical units are often connected directly to powerful political decision-makers at the strategic level.¹⁶ Formally, personnel from tactical units do not have a place in strategic fora. If they bypass the hierarchy, it is not to the liking of officers with formal rank and position. SOF might have a privileged position in the military nexus, but in this process, they were formally treated like any other tactical unit and had no a place at the table.

It is, however, worth reflecting on whether a SOF liaison ought to or could have been included. Firstly, because the formal criteria for participating in the working group were not crystal clear. Norwegians are rather informal, so it probably would not have been a problem to have included a liaison officer from the NORSOFF command. Secondly, SOF personnel had over recent years been key actors in the community of practice, working systematically to develop new procedures, and a few had even written Masters theses on joint targeting-related topics. At the individual level, SOF had some very knowledgeable people that could have contributed to the working group. The third point might be the most important: the joint targeting process is to make sure the Commanders achieves the strategic aims. Personnel from strategic capabilities have experiences to share in a working group on joint capabilities. However, to separate person and position, to select people for their competence and not their rank or position, is difficult even in small nations.

Policy provides the strategic aims and intentions on how to defend the nation. It is work that needs personnel with broad and complementary competences. Such people are found throughout the entire defence sector. For the policy to be clear about how best to utilize national strategic capabilities, it might have been useful to have liaison officers from these units in the working groups. The coin has two sides: personnel with the right competence must be invited, but they they must be willing to contribute. NORSOFF is relatively small and had ongoing international mission. The Commanders make their priorities. If strategic capabilities are going to be used in everyday life, and not only by definition, commanders must acknowledge the long-term importance of policy work in the range of tasks. Sending their best people to policy working groups, even though the operators rather go on missions, can contribute with valuable knowledge.

¹⁵ Crowell, 2015; Spencer, 2018.

¹⁶ Gray, 2015; Kiras, 2018.

On Writing SOP

The Army had for a couple of years worked on a handbook on joint fires, based on the US Marine Corps' handbook. The joint fires community had worked systematically to track their work processes and develop their concepts and procedures. This work was conducted at the Norwegian Army Weapons School and led by officers with backgrounds as JTACs (joint terminal attack controllers).

Officers who came from the joint fires milieu started to work in the Army SOF unit. Their contribution to a handbook on joint targeting in behalf of the NORSOE command started in 2016. This was a bottom-up initiative. Their urge to write this document was based on their experience from the latest exercises, during which they had discussed communication between the levels in the joint targeting process. Their oral practice worked as long as they were co-located with the team from the HQ. However, they realized that it was important to develop procedures on how to communicate formally with the operational level when not co-located, and how to secure formal approvals. These communication procedures needed to be codified and standardized. This kind of document would also work as a way of formalizing and organizing the processes and serve as common ground for the different units in exercises.

The officers working on the writing process were experienced JTACs. Their experience was from being part of a task unit – which is at the sub-tactical level – and the document was based on experiences from international operations. A first draft of the handbook was sent to the researchers for feedback and proof-reading in 2017. It was presented as a generic handbook for joint targeting but had the form of an SOP for the sub-tactical level. It was a checklist of dos and don'ts, an SOP for a SOF task group as they knew it from their deployments, not a handbook for the entire joint targeting cycle.

Writing up a handbook, SOP, or any formal document is a difficult task when the authors do not have working experience from operational and strategic levels and processes, or knowledge that comes from higher education. The first draft of the SOP was not in accordance with the doctrinal joint targeting process. Through their willingness to share the document, they got lots of constructive feedback from the entire community of practice and made substantial improvements. The SOP was not finalized or formally approved. It is still considered “work in progress” or a “living document” – meaning it is in use, and that they can add valuable lessons learned or remove procedures and practices that do not work. This seems to work for the sub-tactical level.

On Revising the Joint Doctrine

The Norwegian Armed Forces has only one Joint Operational Doctrine (2019). The work on revisions of the doctrine was led by a department at the Norwegian Defence University College. Many people and units were asked to provide input when the doctrine was revised. In the spring of 2018, the final draft of this new doctrine was about to be sent out for consultation. At that time, the directive on joint targeting had just been signed. The paragraphs on joint targeting in the old version of the doctrine could at best be called

outdated. A new paragraph on joint targeting had to be drafted so that the doctrine was in accordance with the new directive, and we had to act fast.

One of us had worked at the University College and knew the editor of the doctrine well. The editor sent the old text to her early one morning. The researcher re-wrote the paragraphs on joint targeting, sent it to the leader of the directive working group, who added a few comments, got it validated by the Defence Staff, and returned it to the researcher. She finalized it with the corrections and returned it to the editor. By lunchtime the new text on joint targeting for the doctrine had been revised according to the directive – and it could be sent out as part of the formal consultation and validation process to the defence sector.

This might not be how things ought to be done formally “by the book”. All organizations have informal “fast-tracks” when working under time pressure – especially crisis management institutions like the armed forces. Using the hierarchy is the only way to get formal steering documents approved. Using the network and community of practice is the only way to get things done fast, because networks are valuable, and communities of practice provides room for making processes efficient. In small nations it is easier to speed up processes – even bureaucratic ones – and it should be utilized as a strength.

Exercises – Culture and Structure

The hierarchy is the ideal model in the military for how work *ought* to be done “by the book”. In the process of developing a joint capability, the formal stovepipe military structure is not really set up to support innovation and improvements. Developing new procedures was mainly done during joint exercises, and not as a top-down strategy.

The joint targeting cycle is a top-down process, led from the strategic level. The hub for joint targeting activity is located at the national joint headquarters. Over recent years, the joint targeting section has been playing a central part in building the joint targeting community of practice. Sometimes hubs are put in the “wrong” place for the right reasons, and sometimes they are just placed wherever resources and personnel are available. Formally, the section should initially have established a close cooperation with the Defence Staff at strategic level and educational institutions. It was done later, with support from the community of practice. What this section did, and did well, was to establish good working relations with the strategic capabilities in the Air Force and SOF. They reasoned that by creating an interest in the strategic assets, the rest of the NJHQ and tactical level would follow suit. The NJHQ section became an active participant during exercises, primarily supporting the strategic capabilities. The latter have more training resources, and SOF personnel have an unconventional mindset which is an advantage in innovation and development processes. The section also established good working relations with the Norwegian Battle Lab and Experimentation (NOBLE), due to the section’s primary focus on technological improvement. Thus, together with the strategic capabilities and with technical support from NOBLE, the joint targeting section became an

important player in developing and improving joint targeting procedures at the tactical level. In the following, we present some of these exercises, and the improvements made.

During *Cold Response* 2016, officers from NORSOFF started focusing on the joint targeting process, a change from their previous focus on technology. They met with officers from the section at the NJHQ when the exercise started. The conversation was about what kind of information the NJHQ needed. They discussed and negotiated the content and format for the mission planning and execution phase (phase 5) and combat assessment (phase 6), but not so much on the earlier phases of the joint targeting process.

In the follow-up exercise *Gram* 2016, the tactical focus continued, and thus the role of strategic capabilities in the joint targeting process was developed mainly for the execution phase. During both *Cold Response* and *Gram*, the joint targeting section set the premises for what should and what should not be part of the exercises. The SOF personnel reflected on the apparent absence of an aim to develop and use SOF as a strategic capability – not just a sub-tactical capability. During these exercises, the officers and researchers discussed and analyzed the exercise, and through this reflective process the NSHQ section changed the aims and activities for the following year's exercises.

In the annual *Bold Quest* exercise series, NOBLE together with NORSOFF had over many years tested technology and developed procedures for the tactical level. Before and during the exercise, the NORSOFF task unit leader emphasized that discussions of strategic effects were important. A key challenge in preparing the exercise was its design. Firstly, such design consisted of an unclear mix of technological experiment goals, process development, and tactical training of individual skills. Secondly, the personnel from the joint targeting section at NJHQ played many roles simultaneously – but not the part they should have played, namely their own. Because NJHQ did not play the HQ role, the SOF intention of focusing on strategic effects could, according to them, not be properly tested. However, while the focus in 2016 had been on the execution phase (phase 5) only, the year after they had a broader focus and included phase 2 (development, validation, nomination, and prioritization). By including these analyses, they could better conduct their tactical planning according to the strategic aims and effects.

In later exercises (*Nor Quest* 2018 and *Joint Quest* 2019), the tactical task unit nominated targets that were discussed at the strategic level, a significant change from the early exercises observed. Although the exercises were limited in scope, this exemplified the change in how joint targeting was being improved and implemented in the exercise design – but also that the personnel's mindset had changed, and skillset had improved.

Joint targeting is part of the process of accomplishing strategic effects, and strategic effects were the focus at the large-scale NATO exercises *Trident Javelin* 2017 and *Trident Juncture* 2018. These exercises were meant to test interoperability with NATO and gave the entire joint targeting community good and valuable experiences.

Throughout the various exercises, NJHQ worked with both tactical NORSOFF units and aircraft units led by the Norwegian Air Operations Centre (NAOC). The aims were to

improve communication between levels and units, ensuring input to the common operational picture, and to include the strategic capabilities – SOF and fighter aircrafts. NOBLE facilitated and supported them throughout with new technology to be tested. During these exercises, the sub-tactical and tactical level developed procedures for communication and new ways of cooperating, and thereby improved the joint concept. This cooperation strengthened the community of practice.

The work done by the community of practice in 2016 and 2017 on detailing procedures, served as a foundation for the first test of the formal chain of command and control. In exercise *Arctic Hawk* in 2018, the entire naval structure, including NJHQ and Defence Staff, tested the formal procedures in a joint targeting case. This exercise was a decisive moment in the ongoing development of joint targeting. In some exercises, commanders do not take part but are played by others. In this exercise, everyone trained their real positions. According to the participants the training was valuable for all levels.

Exercises are an important arena for developing joint capabilities. An exercise where this became apparent was the Norwegian Defence University College annual exercise: *Joint Effort*. The instructor from the University College, a former fighter pilot, was key in the community of practice and keen on developing and improving joint targeting conceptually. The first Master's student to write about joint targeting led the joint targeting process during an *Joint Effort* exercise. He returned the year after as a mentor – and in this way the joint targeting process improved. In the following years, new students learned during the exercises, and then became central in developing and improving joint targeting conceptually in the community of practice. In the first years, there was less discussion of strategic effects, while in later exercises there were improved processes, meeting structures, and discussions on strategic effects. The students – later instructors and mentors – gained a better skillset and a more strategic mindset through their education, which they contributed to the entire community of practice.

These joint targeting students came from the strategic capabilities – fighter pilots and the SOF community. The NATO doctrine provides room for SOF to be specially organized: SOF activities are “conducted by specially designated, organized, trained, and equipped forces” (NATO AJP-3.5). Formally, SOF units are organized in hierarchies like the rest of the armed forces. When in missions, the hierarchical chain of command applies. Informally and in everyday life, they are trained to utilize other forms of organization as well. Special operators learn how to optimize the use of the group dynamic, make room for initiative and creativity, discuss and reflect upon important matters in their community of practice, and utilize their powerful networks when they need something done effectively. SOF personnel's ability to switch effortlessly between different social practices allows them to deal with uncertainties and innovate.¹⁷ They are good team players and became key players in developing and improving the joint targeting process.

¹⁷ Danielsen, 2018; Dalgaard-Nielsen & Holm, 2019.

To develop new joint capabilities, working jointly is a precondition. In Norway, the Army, Navy and Air Force have Tactical Schools and Academies, but there is no formal institution that facilitates the development of joint capabilities. Therefore, it takes initiative from individuals to develop joint capabilities. Individuals willing to walk that extra mile to experiment, test and trial, write up documents, attend seminars, pursue formal education – and spend lots of time on exercises. People, units, and services must support and learn from each other in the process.

Seminars – Getting Out of the Echo Chamber

The research team was initially given a formal role as coordinators by the CD&E Council. One way to accomplish our mission was to arrange annual seminars at FFI (Norwegian Defence Research Establishment). To gather people at a site outside military camps is a good way for both commanders and others to get informed on important matters, share information on ongoing processes, build and strengthen networks, and make informal deals. These seminars became important arenas not only to gather the entire joint targeting community of practice, but also to invite outsiders who could bring new perspectives to the community. The key to success was to invite some guest speakers, to have short briefs and long breaks, so there was enough time to discuss important issues. The seminars grew in scope, impact, length, and quality.

The 2016 seminar was a one-day event. It was arranged by colleagues from the joint fires milieu at FFI – focusing primarily on technology and the tactical level. We were invited to present and inform about our joint targeting project. We did not promise any new gadgets, only cultural and structural analysis, and our social science approach was met with interest by some high-ranking officers. This seminar created the foundation for the following seminars.

The 2017 seminar was also a one-day event, a joint venture with colleagues from the joint fires milieu, but this time with joint targeting as the focus. Working with the military for decades, we knew that the commanders needed to be engaged. Commanders have the power to prioritize and provide resources – and if they attend a seminar, the rest will follow suit. Throughout the first year, we had worked to build, facilitate, and support the growing community of practice. It paid off. The 2017 seminar had twice as many participants as the previous year and gathered personnel from *all* levels and services. The seminars were held under the *Chatham House Rule*¹⁸ – to encourage openness and sharing of information. The aim was to create a neutral arena where everybody could discuss openly. The generals and admirals attending were asked not to present reality through rose-tinted glasses. All speakers did their utmost to provide information on the work done at their levels, identified some the gaps, and reminded the audience that there was still some hard work that needed to be done.

¹⁸ The *Chatham House Rule* provides a way for speakers to discuss their views openly in a private setting. It reads as follows : “*When a meeting, or part thereof, is held under the Chatham House Rule, participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed*” (cf. <https://www.chathamhouse.org/chatham-house-rule>).

In 2018 the seminar expanded further. In the two-days event, the focus was on the new national directive. Presenting this, and how it was intended to work in accordance with the new national defence plans, meant that the seminar was classified and conducted in suitable facilities. The first day, commanders from the strategic and operational levels, as well as the service commanders, presented their work and views. The second day was mainly devoted to hands-on presentations from exercises, research experiments, and the educational institutions. The goal of the seminar was to inform commanders and the extended community of practice on the developments in different arenas and improve the work and cooperation. The benefit of having a two-day seminar is the beer-call after the first day. Never underestimate the value of informal talk and network-building in the evening. The seminar was considered valuable, both in form and process, as Bateson would have described it.

The initiative to conduct an annual seminar as an arena for sharing information, discussing ideas, and build a network, originated with FFI. FFI is not part of the military structure, but part of the defence sector, and so it works as a neutral arena and can attract personnel from all levels and services. However, the military must eventually take responsibility for institutionalizing these arenas – it cannot remain dependent on a couple of researchers. After the last seminar, the Director of the NAOC decided that he would “pick up the baton” and make joint targeting the focus of his next annual operational seminar. We supported him and his staff in preparing and arranging the seminar in January 2020 – at FFI. Seminars do neither instrumentally nor automatically become successes, they need formal roles, resources, and dedicated personnel.

Throughout the project, we have presented our research at several national and international symposiums and conferences, both military and academic. These activities were coordinated with key actors in the community of practice. Sometimes we supported them with funding so that they could travel with us, we proof-read their presentations, and we brought our students along and made room for them to present at the FFI seminars. Attending seminars, workshops, and conferences is not something apart from real operative work. They are important arenas for gaining new ideas and make room for reflection. These arenas bring people out of their normal echo chamber – and work as a dialectical processual corrective to the hard-wired everyday structures we work in.

Education – *Cogito ergo sum*

Education provides a framework for meta-learning. Higher education adds methodological competence, which enables people to separate cause and effect, and theoretical competence, which provides a larger toolbox from which to choose the right course of action. This helps and enables people to understand better how and why their tactical actions have strategic effect (Gray, 2015, p.7). Without a cognitive framework, knowledge is based on individual experience only. For military personnel, this often means ground-breaking experiences early in their careers: practices and discourses they learned while working at tactical level. Most personnel at the tactical level do not know how the operational or strategic levels work or what kind of information those levels need, until

they start working there themselves. Experiences grounded in tactical operations do not “naturally” develop into a strategic mindset. In real life very few at tactical level are “strategic corporals”. Critical, strategic thinking comes with education and experience at the strategic level. When military personnel are moved to positions at operational or strategic level – without prior education of the right sort – they will most certainly still aim to solve tactical problems, but from a higher and more powerful position. In the joint targeting process, a strategic mindset and the ability to reflect critically are needed, because the aim is strategic effects and mistakes are devastating.

A challenge in a process of developing new joint concepts is that most personnel are on what the military call “on-the-job training”. The personnel who served in joint targeting positions were good officers, but when they were posted to these positions most of them did not have appropriate education or relevant experience from higher levels. Education takes time. However, in a small community of practice, a handful of well-educated personnel can create a great impact. To make the decision on educating key personnel and sending them to different courses for joint targeting training was vital.

Throughout this project, we have been supervising Master’s students at the Norwegian Defence University College on joint targeting-related topics. The students wrote up in succession, and their work was valuable to the next student as well as the entire community of practice.¹⁹ The students were included in our research activities. They conducted their fieldwork in national exercises, interviewed high-ranking officers, and took part in workshops and conferences. The Master’s students came from the SOF community. They worked hard, passed with great marks, and their theses have contributed valuable and critical knowledge. Equally important, is that the students returned to their units as squadron leaders and in key staff positions. In this way, their studies and new strategic mindset have had a direct impact on the community of practice as well as their home units. Well-educated people in leading positions contribute to elevating the competence of the entire community of practice – while less well-educated personnel can hamper the transformations needed.

The SOF milieu enjoys higher personnel stability than most conventional units. Stability is valuable when working on the development of a new concept because tasks and responsibilities in small units tend to follow the person, rather than the formal position. The students became next year’s mentors – regardless of their formal positions. Our first Master student “John” was appointed director of joint targeting during exercise *Joint Effort*. His experiences were reflected in his thesis. The year after, John was back at *Joint Effort* as a supervisor. He was an external examiner on joint targeting-related subjects, and he also arranged a national course on joint targeting, together with others in the community of practice. After some time, he returned to a SOF unit as Chief of Staff. It was not formally his job to be part of the exercises and supervise the joint targeting process, but John did it because he had valuable knowledge – and he was dedicated and passionate about the subject. Like many others in these units he walked that extra mile to make a difference.

¹⁹ The theses are all in Norwegian and are classified.

Our students thrived when challenged by differently minded social scientists. Students and supervisors build mutual and respectful relationships. Students learn an academic mindset and skillset, and researchers learn from their students' experiences and ideas. The students had quite different starting points, divergent thesis questions, and different levels of academic predisposition. What they had in common was long experience of international operations. They had valuable experience one cannot attain anywhere other than in a war zone. They were used to writing PowerPoint presentations, short notes, and orders – not extended prose. Writing up a Master's thesis provided them with new reflections and perspectives.

It is vital to give newcomers a basic skillset to do their everyday job. Developing new practices and changing the discourses require both experience and education, and a two-week course and a few weeks on exercises every year are not sufficient. Education is considered expensive and time-consuming. In the long run, it is far more expensive *not* to educate the personnel. To provide key personnel with academic skills elevates their units and community of practice. Education gives them a new mindset, so they can reflect more critically about their own practices – which are vital due to the consequences of military activities. State-of-the-art technology is important, but state-of-the-art thinking is even more important in military operations and their everyday lives.

Dialectic Processes – Theory and Methodology Revisited

The development and changes analyzed in this case study is based on four years participant observation, a research project based on a real-life complexity that cannot be invented in an artificial context. Well-known models of organizational change are ideal, but these models with arrows pointing nicely in one direction do not really fit complex changes in big organizations. Systematic surveys give systematic data, but they are only fragments of the big picture. Being in the field over years provided data on how all the levels, actors, and conditions were at play at the same time.

Theoretically, our analyses can contribute to the debate on some of the challenges in changing the culture in an organization. In times of change, leadership initiatives in organizations are never simply implemented; they are always shaped by the ways in which subordinates applaud, resist, sabotage, or ignore them (Vike, 2013, p.122). Also in the military, transformation processes are hardly ever implemented without resistance and strain. Contextualized ethnography illuminates the cacophony and complexity of everyday life in military organizations. This allows us to deal with the case holistically: at individual, institutional, and international levels.

The concept of dialectics gives an analytical framework for processes that are not linear and where it is not possible to know or predict the “end-state” in advance. Ideas and classifications on how things ought to be were complex and involved several perspectives. Diversity was a source for change – everyone needs to get out of the echo chamber to gain new views every now and then. The process of crossing boundaries – between professional mindsets and the practices of different services – provided new perspectives and adjusted

taken-for-granted truths.²⁰ It was through these dialectical processes that changes happened. The changes in individuals as well as the institution were not abrupt; it was a discontinuous zig-zag process, where the different roles and ideas were challenged, negotiated, tested, and reflected upon. Innovation processes follow multiple paths of dialectical change – relational, temporal, and cultural.²¹ By analyzing these processes holistically, based on real-life practices and discourses, we provide new knowledge and develop the theoretical toolbox.

Sun Tzu had a valid point: “*If you know the enemy and know yourself, you need not fear the result of a hundred battles [...]. If you know neither the enemy nor yourself, you will succumb in every battle*”. The military needs to know its real self, not only its ideal self. In all organizations and communities there are struggles between knowledge and ignorance played out in social relations. While it is difficult to record what people do know, it is equally important to address the features of *not* knowing.²² Our role as social researchers was to mirror the practices and discourses in the field. We knew it was not going to be easy to challenge the institutional structures, local heroes, and echo chambers. Finding our way into the closely-knit and intricate networks, experimenting, and experiencing what at times were massive pushbacks, provided for analytical insights and grounds for theory building.²³ Working with personnel trained in ambush techniques and strategic attacks located our role as being between a rock and a hard place. Throughout the field-work there were heated discussions, which were essential to how the field progressed; what *is* joint targeting, how should it be conducted, who is at the centre of the activity, and who should have the power to define the field. This underscores that it is important to raise awareness of the not known, make room for reflection, and learn from the challenges – so people do not succumb in their everyday battles.

Concluding Remarks

Globalization has added complexity to military operations, and changes in the international security environment are rapid. The military institution and hierarchical structure are not really set up for embracing new ideas and changes of practice (Kilcullen, 2013). This article and analyses shed light on potential issues in combined joint operations. There are always individuals coming up with smart ideas, and they are eager to improve, but working bottom up means that it is difficult to get new practices and ways of thinking institutionalized.

To develop new mindsets and practices is difficult in any organization. To introduce new joint concepts in a military structure that has no dedicated entity responsible for it, is difficult. Building a community of practice made possible informal knowledge sharing and initiatives, bottom-up and top-down contributions from all levels in the

²⁰ Harries-Jones, 1995, p. 263.

²¹ Lawrence & Lorch, 1967; Garud, Tuertscher & Van de Ven, 2013 ; Van de Ven, Ganco & Hinings, 2013.

²² Dilley 2010, pp. S177.

²³ Garsten & Nyquist, 2013.

hierarchy. The improvement of this joint concept was driven by individuals from a variety of backgrounds in terms of rank or position. The innovation and changes were made due to their dedication, and not necessarily due to their formal status. Learning and improvement took place in several, but tightly interwoven arenas. Producing new steering documents, testing and improving practices at exercises, seminars and workshops, and higher education combined, improved the joint concept and made the institutionalization of this joint process more effectively.

The members of the community of practice put aside their traditional clan feuds and worked together in all the different arenas to accomplish the mission. In a small nation such as Norway, no military unit, branch, or even service is big enough to work in splendid isolation. Everyone is dependent on the knowledge, skills, network, technology, equipment, funding, and manpower of others. No man is an island. To know each other or know someone who knows the person one needs help or support from, is a strength. The key for small armed forces to improve, is to nurture a culture of innovation and improvement, cherish diversity, and utilize their size.

Size matters. Small and big nations operate differently. The scale of small states can be utilized as an asset and strength. Information, innovation, and improvement processes can be conducted very fast – because everybody knows everyone. It is taken for granted that everyone works according to the same NATO doctrine, and they do. Military personnel are trained and educated in an institutional apprenticeship, which makes the military profession and culture globally recognizable. It is, however, equally important to be aware that differences are sometimes “hidden”, because everyone in international operations speaks English and uses the same technology. But terminology and semantics is challenging in international operations and cooperation. Knowledge and awareness of what is the same and what just looks the same, but is culturally different – are not only useful, but vital, to make things work in military operations.

By discussing how mindsets and skillsets are vital to organizational changes and scrutinizing some of the myths and truths, we have pinpointed some central everyday life issues in the military. Learning, innovation, and improvements take time – institutionalizing these changes takes even longer. This case study describes how the personnel gained new ways of cooperating and learned to reflect on their own practices. Their main myth was “with good people, we will work it out just fine”. Good people are good, but what was needed was getting national steering documents in place, exercises with room for testing new ways of thinking and not only new technology, the creation of arenas where these good people could meet, discuss, argue, network, inform, and inspire each other, and that key personnel are well educated. To reach strategic aims takes good commanders and well-educated staffs, but also a good community of practice. A community with enough diversity in profiles to avoid group-think, with the strength to walk that extra mile, with the knowledge that sometimes they need to cross boundaries to gain new perspectives, with the courage to reflect on their real self – which combined will enable them to rise to the challenges of the global era

References

- BATESON, Gregory, *Steps to Ecology of Mind*, New York, Ballantine Books, 1972.
- BATESON, Gregory, *Mind and Nature: A Necessary Unit*, New York, E. P. Dutton, 1979.
- BEN-ARI, Eyal, *Mastering Soldiers: Conflict, Emotion, and the Enemy in an Israeli Military Unit*, New York, Berghahn Books, 1998.
- CARVALHO, Benjamin de & Iver B. NEUMANN, *Small State Status Seeking – Norway’s Quest for International Standing*, New York, Routledge, Taylor & Francis Group, 2015.
- CROWELL, Forrest, *Navy SEALs Gone Wild: Publicity, Fame, and the Loss of the Quiet Professional*, Master’s Thesis, Monterey, CA, Naval Postgraduate School, 2015.
- DALGAARD-NIELSEN, Anja & Kirstine Falster HOLM, “Supersoldiers or Rulebreakers? Unpacking the Mind-Set of Special Operations Forces”, *Armed Forces & Society*, vol.45, n°4, 2019, pp.1-21.
- DANIELSEN, Tone, “Lack of Diversity and the Risk of Failing to Evolve”, Risk and Decision-Making, Editor: B. Horn, CANSOFCOM Education & Research Centre, ISBN: 978-0-660-31729-8, 2019.
- DANIELSEN, Tone, *Making Warriors in a Global Era. An Ethnographic Study of the Norwegian Special Operations Commando*, Lanham, MD, Lexington Books, 2018.
- DANIELSEN, Tone, “The ‘Seamen’s Council’: a SOFish way of making decisions”, in J.G. Turley, K. Michael & E. Ben-Ari (eds.) *Special Operations Forces in the 21st Century, Perspectives from the Social Sciences*, London, Routledge Taylor & Francis Group, 2018b, pp.105-119.
- DANIELSEN, Tone & Sigmund VALAKER, “Teknologisk innovasjon med fart og retning i specialstyrkene” (Technological Innovation with Aim and Speed in the Special Operations Forces), *FFI-rapport 2009/00516*, 2009.
- DILLEY, Roy, “Reflections on Knowledge Practices and the Problem of Ignorance”, *Journal of the Royal Anthropological Institute (N.S.)*, 2010, pp. S176–S192.
- DOUGLAS, Mary, *How Institutions Think*, New York, Syracuse University Press, 1986.
- ERIKSEN, Thomas Hylland, *Small Places – Large Issues: An Introduction to Social and Cultural Anthropology*, Oslo, Universitetsforlaget A/S, 2001.
- ERIKSSON, Gunilla & Ulrica PETERSSON, *Special Operations from a Small State Perspective: Future Security Challenges*, Basingstoke, Palgrave Macmillan, 2017.
- GARSTEN, Christina & Anette NYQUIST, *Organisational Anthropology: Doing Ethnography in and among Complex Organisations*, London, Pluto Press, 2013.
- GARUD, Raghu, Philip TUERSTCHER & Andrew H. VAN DE VEN, “Perspectives on Innovation Processes”, *The Academy of Management Annals*, vol.7, n°1, 2013, pp.775-819.
- GEERTZ, Clifford, *Works and Lives: The Anthropologist as Author*, Stanford, CA, Stanford University Press, 1988.
- GEORGE, Alexander L. & Andrew BENNET, *Case Studies and Theory Development in the Social Sciences*, Cambridge, MA, MIT Press, 2005.
- GILL, Terry D., “Some Considerations Concerning the Role of the Ius ad Bellum in Targeting”, in P.A. Ducheine, M.N. Schmitt & F.P.B. Osinga (eds.), *Targeting: The Challenges of Modern Warfare*, The Hague, Asser Press Springer Verlag, 2016.
- GRAY, Colin S., “Tactical Operations for Strategic Effect : The Challenge of Currency Conversion”, *Joint Special Operations University Special Report*, MacDill Air Force Base Florida, The JSOU Press, 2015.
- HARRIES-JONES, Peter, *A Recursive Vision : Ecological Understanding and Gregory Bateson*, Toronto, University of Toronto Press, 1995.
- HUTCHINS, Edwin, *Cognition in the Wild*, Cambridge, MA, The MIT Press, 1995.

- KILCULLEN**, David, *Out of the Mountain – The Coming Era of the Urban Guerilla*, London, Hurst & Company, 2013.
- KING**, Anthony, “What is Special about the Special Operations Forces?” in J.G. Turley, K. Michael & E. Ben-Ari (eds.) *Special Operations Forces in the 21st Century, Perspectives from the Social Sciences*, London, Routledge Taylor & Francis Group, 2018, pp.273-284.
- KIRAS**, James D, “‘Unintended Acceleration’: The Problematique of Civil-Military Relations of Special Operations Forces in the American Context”, in J.G. Turley, K. Michael & E. Ben-Ari (eds.) *Special Operations Forces in the 21st Century, Perspectives from the Social Sciences*, London, Routledge Taylor & Francis Group, 2018, pp.74-88.
- KLEIN**, Gary, *Streetlights and Shadows : Searching for the Key to Adaptive Decision-Making*, Cambridge, MA, The MIT Press, 2009.
- LAVE**, Jean & Etienne **WENGER**, *Situated Learning : Legitimate Peripheral Participation*, Cambridge, Cambridge University Press, 1991.
- LAWRENCE**, Paul R. & Jay W. **LORSCH**, “Differentiation and Integration in Complex Organizations”, *Administrative Science Quarterly*, vol.12, n°1, 1967, pp.1-30.
- MARCHAND**, Trevor H.J., “Muscles, Morals, and Mind : Craft Apprenticeship and the Formation of Person”, *British Journal of Educational Studies*, vol.56, n°3, 2008, pp.245-271.
- M CRAVEN**, William H., *Spec Ops : Case Studies in Special Operations Warfare Theory and Practice*, New York, Presidio Press, 1995.
- NATO**, *MC 471. MC 471: NATO Targeting Policy*, 2007.
- NATO**, *AD 80-70. ACO Directive (AD) 80-70: Campaign Synchronization and Joint Targeting in ACO*, 2010.
- NATO**, *AJP 3.9. AJP-3.9: Allied Joint Doctrine for Joint Targeting (A version 1)*, 2016.
- NEITZEL**, Sönke & Harald **WELZER**, *Soldater: beretninger om krig, drap og død (Soldiers: On Fighting, Killing, and Dying)*, translated by Nina **ZANDJANI**, Oslo, Forlaget Press, 2012.
- NORWEGIAN MINISTRY OF DEFENCE**, *Capable and Sustainable*, 2016. Available on line at : <https://www.regjeringen.no/globalassets/departementene/fd/dokumenter/rapporter-og-regelverk/capable-and-sustainable-ltp-english-brochure.pdf>.
- NORWEGIAN ARMED FORCES**, *Direktiv for metodisk målbekjemping (Joint Targeting Directive)*, 2018.
- NORWEGIAN ARMED FORCES**, *Norwegian Armed Forces Joint Operational Doctrine (FFOD)*, Norwegian Defence University College, 2019.
- OSINGA**, Frans P.B. & Mark R. **ROORDA**, “From Douhet to Drones, Air Warfare, and the Evolution of Targeting”, in P.A. Ducheine, M.N. Schmitt, & F.P.B. Osinga (eds.), *Targeting: The Challenges of Modern Warfare*, The Hague, Asser Press Springer Verlag, 2016.
- PÁLSSON**, Gisli, “Enskilment at Sea”, *Man*, vol.29, n°4, 1994, pp.901-927.
- RESTEIGNE**, Delphine, “Aiming to Punch above their Weight: The Belgian Special Operations Forces”, in J.G. Turley, K. Michael, & E. Ben-Ari (eds.) *Special Operations Forces in the 21st Century : Perspectives from the Social Sciences*, London, Routledge Taylor & Francis Group, 2018, pp.152-163.
- RIESSMAN**, Catherine Kohler, “Narrative Analyses”, in M.B. Miles & A.M. Huberman (eds.), *The Qualitative Researcher Companion*, London, Sage, 2002.
- SIMONS**, Anna, *The Company They Keep : Life Inside the U.S. Army Special Forces*, New York, The Hearst Corporation, 1997.
- SINCLAIR**, Simon, *Making Doctors : An Institutional Apprenticeship*, Oxford, Berg, 1997.
- SMITH**, Rupert, *The Utility of Force : The Art of War in the Modern World*, New York, Alfred Knopf, 2005.

- SPENCER**, Emily, “The Special Operations Forces Mosaic : A Portrait for discussion”, in J.G. Turley, K. Michael, & E. Ben-Ari (eds.), *Special Operations Forces in the 21st Century, Perspectives from the Social Sciences*, London, Routledge Taylor & Francis Group, 2018, pp.41-56.
- SPULAK**, Robert, “Innovate or Die : Innovation and Technology for Special Operations”, *Joint Special Operations University Report*, vol.10, n°7, 2010, pp.1-61.
- STRATHERN**, Marilyn, “Cutting the Network”, *Journal of the Royal Anthropological Institute*, vol.2, n°3, 1996, pp.517-535.
- SØRHAUG**, Tian, *Managementlitet og autoritetens forvandling. Ledelse i en kunnskapsøkonomi* (Managementality and the Transformation of the Authorities), Bergen, Fagbokforlaget AS, 2004.
- TURNLEY**, Jessica Glicken, Eyal **BEN-ARI** & Kobi **MICHAEL**, “Special Operations Forces (SOF) and Social Science: An Introductory Essay”, in J.G. Turley, K. Michael & E. Ben-Ari (eds.), *Special Operations Forces in the 21st Century, Perspectives from the Social Sciences*, London, Routledge Taylor & Francis Group, 2018, pp.1-12.
- VAN DE VEN**, Andrew H. & Marshall Scott **POOLE**, “Explaining Development and Change in Organizations”, *The Academy of Management Review*, vol.20, n°3, 1995, pp.510-540.
- VAN DE VEN**, Andrew H., Martin **GANCO** & C.R. (Bob) **HININGS**, “Returning to the Frontier of Contingency Theory of Organizational and Institutional Designs”, *The Academy of Management Annals*, vol.7, n°1, 2013, pp.393-440.
- VIKE**, Halvard, “The Instrumental Gaze : The Case of Public Sector Reorganisation”, in C. Garsten & A. Nyquist (eds.), *Organisational Anthropology: Doing Ethnography in and among Complex Organisations*, London, Pluto Press, 2013, pp.120-138.
- WAQUANT**, Loic, *Body and Soul : Notebooks of an Apprentice Boxer*, Oxford, Oxford University Press, 2004.
- WULFF**, Helena, *Ballet across Borders: Career and Culture in the World of Dancers*, Oxford, Berg Oxford International Publishers, 1998.