

**The Canada-United States Permanent Joint Board on Defence (PJBD):
An examination of its advice outcomes legacy, 1940-2023**

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A thesis submitted to the Faculty of Graduate Studies of
The University of Manitoba
in partial fulfillment of the requirements for the degree of

MASTER OF ARTS

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(August 2023)

Abstract

The Canada-United States Permanent Joint Board on Defence (PJBD) was created on 18 August 1940 via the Ogdensburg Agreement, a one-page joint press release issued by Mackenzie King and Franklin Roosevelt. The impetus for the Agreement was the extreme sense of urgency to defend North America given World War II. The PJBD is, in theory, the most important advice provider on North American defence issues to the Canadian Prime Minister and American President. In reality, it has sustained little academic attention, government records are difficult to attain, and given its broad mandate of providing advice on the political and economic consequences of any defence and security issue in “the north half of the western hemisphere,” its infrequent use is perplexing.

This is the first study on the PJBD since 1969 and serves as a one-stop-shop for future scholars and policymakers that analyses the PJBD from creation to 2023. To evaluate the PJBD’s decision making role over time and to glean some lessons learned, this thesis has compiled the Board’s record of activity previously scattered throughout secondary literature into a chronography (1927-1945, 1946-1991, 1992-2023) – reflecting geopolitical eras and the peaks and valleys of attention given to continental defence by senior decision-makers.

Renewed Great Power Competition between the United States, Russia, and China demands further integration of the Canada-United States defence relationship. Ultimately, this research concludes that the flexible mandate of this secret advisory board and mix of civilian and military representatives provides a forum that encourages frank conversations in private, which is especially useful in an era of hyper-partisanship. As well, as problems and solutions become more technically complicated and require a myriad of agencies to cooperate, the PJBD facilitates a better understanding of the positions and concerns of binational partners. Nevertheless, there are

challenges to the PJBD which are highlighted and policy advice is provided for the PJBD's next iteration.

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Acknowledgements

This thesis was only possible with the advisement, patience, and trust of my indefatigable advisor Dr. Andrea Charron and of Dr. James Fergusson. Thank you both for your unwavering support throughout my undergraduate and graduate studies, personally and professionally. I have enjoyed every moment of your teaching and guidance as you ensured I received a quality education. You truly care about your students and work tirelessly to provide us with every opportunity to succeed. I am privileged to have such caring mentors and owe you both the most appreciation and gratitude.

Thank you to Dr. Andrea Rounce in your role as examiner and for taking a chance on me back at the 2020 J.W. Dafoe Political Studies Students' Conference – which originally opened the idea of completing an MA. Thank you to Dr. Susan Prentice in your role as committee chair and for always being most encouraging and complimentary. Additionally, I'd also like to thank Dr. Joseph T. Jockel, The Honourable Mr. Laurie Daniel Hawn, Dr. Lance Blyth, and Dr. P. Whitney Lackenbauer for sharing their time and knowledge of the PJBD. I owe an additional debt of gratitude to Maria-Otilia Nagy and Jay Dion for assisting with transcribing the appendices.

Thank you for the steadfast support and kindness from those closest to me: Mom and Samantha, Jay, Julian, Adam, Laura, Teresa, Mackenzie, Carrie, Evan, Scott, the Stokes family, and the Olsons. The courage and resilience all of you exhibit is inspiring.

Finally, I would like to acknowledge the generous funding and professional development assistance I have received: the 2022-2023 Social Sciences and Humanities Research Council of Canada (SSHRC) Canada Graduate Scholarship-Master's (CGS-M); Dr. Susan Prentice as The Duff Roblin Professor of Government and the 2021-2023 Duff Roblin Fellowship in Canadian and Manitoba Government and Politics; the 2022-2023 University of Manitoba Faculty of Graduate

Studies and the Research Completion Scholarship; the 2021-2023 Dr. Paul Buteux Graduate Student Conference and Research Award; the 2021-2022 Manitoba Chair of Global Governance Studies Murray and Muriel Smith Scholarship; and, the Centre for Defence and Security Studies (CDSS), the North American and Arctic Defence and Security Network (NAADSN) and the Canadian Defence and Security Network (CDSN).

For Daniel, my friend, whom I miss and hope would be proud

List of Abbreviations and Definitions

| | |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------|
| 9/11 | September 11th, 2001 terrorist attacks in the United States |
| ABC-1 | US-British Staff Conference of 1941 |
| ABC-22 | Joint Canadian-United States Basic Defence Plan No.2 |
| ADC | Air Defence Commander(s) |
| ADCOM | US Aerospace Defence Command Emergency Dispersal |
| ADCOM | US Aerospace Defense Command |
| ADMPol | Canadian Department of National Defence Assistant Deputy Minister for Policy |
| ADS | Air Defence System |
| ALCMs | Air-launched cruise missiles |
| ASD | US Assistant Secretary of Defense |
| ASD/ISA | US Assistant Secretary of Defense for International Security Affairs |
| ASD/HD&HA | US Assistant Secretary of Defense for Homeland Defense and Hemispheric Affairs |
| ATIP | Access to Information and Privacy Act |
| AWACS | Airborne Warning and Control System |
| Basic Plan No.1 | Joint Canadian-United States Basic Defence Plan-1940 (or Black Plan) |
| Black Plan | Joint Canadian-United States Basic Defence Plan-1940 (or Basic Plan No.1) |
| BMEWS | Ballistic Missile Early Warning System |
| BOMARC | Boeing CIM-10 (Boeing Michigan Aeronautical Research Center) supersonic ramjet powered long-range surface-to-air missile |
| BPG | Bi-National Planning Group |
| BRI | Belt and Road Initiative |
| BSP | Basic Security Plan |

| | |
|----------------|--------------------------------------------------------------------------------------|
| C ² | Command and Control |
| CAF | Canadian Armed Forces |
| CANUS | Canada-United States Relationship |
| CCP | Chinese Communist Party |
| CDS | Canadian Chief of the Defence Staff |
| CJCS | US Chairman of the Joint Chiefs of Staff |
| CJOC | Canadian Joint Operations Command |
| CoCOMs | US Unified Command Plan Combatant Commands |
| CONAD | US Continental Air Defense Command |
| DEW Line | Distant Early Warning Line |
| DFAIT | Department of Foreign Affairs and International Trade (now Global Affairs Canada) |
| DHIST | DND Directorate of History |
| DND | Department of National Defence |
| DOBs | Dispersed Operating Bases |
| DoD | US Department of Defense |
| DPSA | Defense Production Sharing Agreement |
| EvoNAD | Evolution of North American Defence study |
| FAA | US Federal Aviation Administration |
| FEMA | US Federal Emergency Management Agency |
| FOLs | Forward Operating Locations |
| GAC | Global Affairs Canada |
| GMD | Ground-based Midcourse Defense |
| GPALS | Global Protection against Limited Strikes |

| | |
|---------|-------------------------------------------------------|
| HGVs | Hypersonic glide vehicles |
| IJC | International Joint Commission |
| JCS | US Joint Chiefs of Staff |
| JIATF | Joint Interagency Task Force South |
| JUSCADS | Joint US-Canada Air Defence Study |
| LORAN | Long-Range Navigation Radar |
| MCC | Military Cooperation Committee |
| MP | Canadian Member of Parliament |
| MSG | Canada-U.S. Military Study Group |
| NATO | North Atlantic Treaty Organization |
| NMD | National Missile Detection |
| NORAD | North American Aerospace Defense Command |
| NSC | US White House National Security Council |
| NWS | North Warning System |
| OSD(P) | US Office of the Secretary of Defense for Policy |
| OTH-B | Over-the-Horizon Backscatter Radar |
| PCO | Privy Council Office |
| PMO | Office of the Prime Minister |
| PJBD | Canada-United States Permanent Joint Board on Defence |
| PSEPC | Public Safety and Emergency Preparedness Canada |
| RCAF | Royal Canadian Air Force |
| RCN | Royal Canadian Navy |
| SAC | Strategic Air Command |

| | |
|------------|------------------------------------------|
| SAGE | Semi-Automatic Ground Environment |
| SAM | Surface-to-air missile |
| SDI | Strategic Defense Initiative |
| SLBMs | Submarine-launched ballistic missiles |
| SLCMs | Sea-launched cruise missiles |
| SOSUS | Underwater Acoustic Surveillance Systems |
| TAC | US Tactical Air Command |
| TACAN | Tactical Air Navigation Radar |
| TOR | Terms of Reference |
| UCP | US Unified Command Plan |
| UK | United Kingdom |
| UN | United Nations |
| US | United States of America |
| USAF | US Air Force |
| USN | US Navy |
| USNORTHCOM | US Northern Command |
| USSOUTHCOM | US Southern Command |
| USSTRATCOM | US Strategic Command |
| WWII | World War II |

Chapter 1: Introduction

1.1: Rationale

The Canada-United States (CANUS) defence relationship is complex. In addition to hundreds of agreements and memoranda of understanding, it is anchored in an informal defence agreement.¹ This agreement codifies a pledge by US President Franklin Roosevelt in 1938 and Prime Minister William Lyon Mackenzie King's verbal response in a joint press release published on 18 August 1940. The joint press release is colloquially known as the Ogdensburg Agreement, as the press release was penned on a dining room tablecloth in a train car travelling from Ogdensburg to Heuvelton, New York.²

The Ogdensburg Agreement created the Canada-United States Permanent Joint Board on Defence (PJBD) - a civilian defence advisory board.³ The mandate of this body is to "consider in the broad sense the defense of the north half of the Western Hemisphere."⁴ In theory, it is responsible for coordinating binational activity on sensitive matters of continental defence and security and is the most important provider of advice to the Prime Minister and the President. In reality, the Board has largely been relegated to the margins of the CANUS relationship in favour of other forums, which have often originated from the PJBD's advice.

The PJBD was significant during World War II (WWII), spurred by the extreme sense of urgency of threats to North America posed by Nazi Germany and Imperial Japan. In its first five

¹ Canada spells defence in English with a c while the United States prefers an s. Therefore, you will see both spellings. Additionally, "continental defence" is the preferred term for Canadian officials when discussing the defence of North America. US military parlance refers to "homeland defence."

² Joel Sokolsky and Joseph T. Jockel, *Fifty Years of Canada-United States Defense Cooperation: The Road From Ogdensburg*, (Lewiston, New York: The Edwin Mellen Press, 1992), 2; William R. Willoughby, *The Joint Organizations of Canada and the United States*, (Toronto: University of Toronto Press, 1979), 107.

³ This thesis will refer to the Canada-US Permanent Joint Board on Defence as "PJBD" or the "Board" interchangeably.

⁴ Franklin D. Roosevelt, "The Great Communicator": The Master Speech Files, 1898, 1910-1945 File No. 1168 (August 18, 1938) Kingston, Ontario, Canada - Address at Queens University: 4.

years, the Board met 42 times and provided 33 joint recommendations by time the Pacific campaign ended in 1945.⁵ Crucial recommendations included the defence of the then-British colony Newfoundland, the construction of the Alaska Highway,⁶ and the construction of the Northwest Staging Route of airfields built from Edmonton to Nome.⁷

Two decisions contributed to the PJBD's reduced role after the end of the war. First, the creation of the Military Cooperation Committee (MCC), at the recommendation of the PJBD, meant that technical, combined military planning now took place in this forum. Second, the restructuring of the US national security bureaucracy, as a result of the *National Security Act* of 1947, created the centralized National Security Council (NSC) as the primary advice-providing forum to the US President. This meant fewer topics were fed to the PJBD for consideration.⁸

Beyond these two decisions, PJBD recommendations had formalized the CANUS defence relationship from ad-hoc advice-providers to formal institutionalized organizations, such as the operationalization of the North American Air (later Aerospace) Defense Command (NORAD) in 1957.⁹ The critical defence literature viewed the Board as no longer useful because it had largely been relegated to a house-keeping role and was no longer recommending far-reaching advice. Academic analysis of the PJBD beyond 1964 is scarce.

⁵ See: Appendix A.

⁶ Andrea Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," *Centre for Defence and Security Studies*, 25 February 2020, 4, https://umanitoba.ca/centres/media/The-Permanent-Joint-Board-on-Defence-final-workshop-report_2020.pdf.

⁷ Hugh L. Keenleyside, *Canada and the United States: Some Aspects of Their Historical Relations*, (New York: Knopf, 1952), 369-370.

⁸ 80th Congress of the United States, "The National Security Act of 1947," *80th Congress of the United States*, 26 July 1947, Ch. 343, S. 758, <https://www.hsdl.org/?abstract&did=2787>.

⁹ Christopher Conliffe, "Permanent Joint Board on Defense," in David G. Haglund and Joel J. Sokolsky, *The US-Canada Security Relationship: The Politics, Strategy, and Technology of Defense*, 162-163, (Boulder: Westview Press, 1989).

Today, Canada enjoys and fiercely protects knowledge of, access to, and influence over US thinking and plans for continental defence.¹⁰ Great Power Competition has also been on the rise since 2014, requiring a rethink of continental defence; and yet, the PJBD is under-utilized. The PJBD did not meet during its 80th anniversary year in 2020, met online once in 2021,¹¹ and only met once in 2022.¹² This is despite the growing threat from Russia and China and pressing issues such as the expansive and expensive modernization of the binational North American Aerospace Defense Command (NORAD).¹³ Given that the Board's scope of interest includes the political and economic consequences of any defence and security issue in the north half of the western hemisphere, the PJBD's lack of use is puzzling.¹⁴

A new study of the PJBD is important given there is not one literary source that provides an overview of the history of the Board and its contemporary challenges. This thesis seeks to address a major gap in the existing PJBD literature as there has not been an academic study conducted on the Board since David Beatty's 1969 Ph.D. dissertation at Michigan State University, which studied the advisory body until 1964 and hypothesized its future.¹⁵ There has never been an

¹⁰ James Fergusson, *Canada and Ballistic Missile Defence, 1954-2009: Déjà Vu All Over Again*, (Vancouver: UBC Press, 2010), 122.

¹¹ Government of the United States, "US-Canada Permanent Joint Board on Defense Discusses Defense Priorities, NORAD Modernization," *US Department of Defense*, 25 June 2021, <https://www.defense.gov/News/Releases/Release/Article/2671975/us-canada-permanent-joint-board-on-defense-discusses-defense-priorities-norad-m/>.

¹² Government of the United States, "Readout of the 240th Meeting of the U.S.-Canada Permanent Joint Board on Defense," *U.S. Department of Defense*, 28 October 2022, <https://www.defense.gov/News/Releases/Release/Article/3203702/readout-of-the-240th-meeting-of-the-us-canada-permanent-joint-board-on-defense/>.

¹³ Government of Canada, "Minister of National Defence Announces Canada's NORAD Modernization Plan," *Department of National Defence*, 20 June 2022, <https://www.canada.ca/en/department-national-defence/news/2022/06/minister-of-national-defence-announces-canadas-norad-modernization-plan.html>. NORAD is responsible for the aerospace control, aerospace warning, and the maritime warning of the continental US and Canada. See: Government of Canada, *Agreement Between the Government of Canada and the Government of the United States of America on the North American Aerospace Defense Command E105060*, 28 April 2006, <https://www.treaty-accord.gc.ca/text-texte.aspx?id=105060>.

¹⁴ David Beatty, *The Canada-United States Permanent Joint Board on Defence*, (East Lansing, MI: Michigan State University, 1969), 305.

¹⁵ Beatty, *The Canada-United States Permanent Joint Board on Defence*.

M.A. thesis on the PJBD. General McNaughton (Canadian PJBD co-Chair from 1945-1959) briefly advocates for the PJBD's importance in 1948.¹⁶ Keenleyside and Stacey also cover the wartime years – although their information is eventually supplanted by Colonel Dziuban's 1959 publication.¹⁷ Lieutenant-Colonel Christopher Conliffe and Dr. Joseph T. Jockel's analysis written in the 1980s covers PJBD activity up to 1964.¹⁸ Dr. Richard Goette and Dr. Galen Roger Perras also offer contemporary analysis of the PJBD's actions until 1953.¹⁹ From the end of the Cold War in 1991 until 2020, there are only six articles written on the PJBD: political scientists David Haglund and Michel Fortmann in 2002 (two);²⁰ former US PJBD co-Chair Dwight N. Mason in 2005 (two),²¹ and, Dr. Andrea Charron and Dr. P. Whitney Lackenbauer in 2020.²² The Board was not the focus of academic attention during the aftermath of September 11th, 2001, as the temporary

¹⁶ A.G.L. McNaughton, "Unity for Defense: The Goal of the Canada-U.S. Permanent Joint Board," *Ordnance* 32, no. 166 (January-February 1948): 257-258.

¹⁷ See Chapter 2.2 Literature Review; Hugh L. Keenleyside, "The Canada-United States Permanent Joint Board on Defence, 1940-1945," *International Journal* 16, no. 1 (1960): 50-77; C. P. Stacey, "The Canadian-American Permanent Joint Board on Defence, 1940-1945," *International Journal*, 9, no. 2 (1954), 107-124.

¹⁸ Jockel, *No Boundaries Upstairs: Canada, the United States, and the Origins of North American Air Defence, 1945-1988*, (Vancouver: UBC Press, 1987); Christopher Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration," *Canadian Defence Quarterly* 18 (Summer 1988): 54-60; Christopher Conliffe, "The Permanent Joint Board on Defence, 1940-1988," in *The US-Canada Security Relationships: The Politics, Strategy and Technology of Defense*, eds. David Haglund and Joel Sokolsky, (Boulder: Westview Press, 1989).

¹⁹ Richard Goette, *Sovereignty and Command in Canada-US Continental Air Defence 1940-57* (British Columbia: UBC Press, 2018), 75; Galen Roger Perras, "'Keen to Foul Their Own Nests': Contemporary and Historical Criticism of the Permanent Joint Board on Defence of 1940," *London Journal of Canadian Studies* 36, no. 1 (29 September 2022): 24-56; Galen Roger Perras, "Future plays will depend on how the next one works': Franklin Roosevelt and the Canadian Legation Discussions of January 1938," *Journal of Military and Strategic Studies* 8, no. 4 (Summer 2006): 1-31.

²⁰ Michel Fortmann and David G. Haglund, "Canada and the Issue of Homeland Security: Does the 'Kingston Dispensation' still hold?," *Canadian Military Journal* 3, no. 1, (Spring 2002): 17-22; David G. Haglund, "The 'Kingston Dispensation' and the North American Stable Peace Post 9/11," in *The Legacy of 9/11: Views from North America*, eds. Andrea Charron, Alexander Moens, and Stéphane Roussel (Montreal/Kingston: McGill-Queen's University Press, 2023), 83-98.

²¹ Dwight N. Mason, "The future of Canadian-US defense relations," *The American Review of Canadian Studies* 33, no. 1 (Spring 2003), 63-91, DOI:10.1080/02722010309481150; Dwight N. Mason, "The Canadian-American North American defence alliance in 2005," *International Journal* 60, no. 2 (Spring 2005): 285-296.

²² Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint?"; P. Whitney Lackenbauer, "Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty," *North American and Arctic Defence and Security Network*, 16 August 2020, <https://www.naadsn.ca/wp-content/uploads/2020/08/20-Aug-Lackenbauer-PJBD-at-Eighty.pdf>; Mason, "The future of Canadian-US defense relations," 63-91; Mason, "The Canadian-American North American defence alliance in 2005," 285-296.

Bi-National Planning Group (BPG) was the venue for the enhancement of CANUS military cooperation.²³

It is noteworthy that a similarly constructed CANUS binational advisory board, the International Joint Commission (IJC), has been the focus of academic attention from numerous disciplines – an institution for which Mackenzie King, the Canadian pen of the Ogdensburg Agreement, had great affection and admiration.²⁴ Furthermore, there has not been a *Canadian* academic thesis or dissertation focused solely on the PJBD during its existence — an interesting conundrum given the positive initial reception of the Ogdensburg Agreement in Canada²⁵ and its importance relative to the establishment of the Canada-US defence relations writ large.

To determine the relevancy of the PJBD in the 21st century, its legacy of advice outcomes must be examined to determine its continued utility as a forum that flourishes as a conduit to discuss sensitive political decisions away from public spotlight. By using background information on the PJBD's activity, found primarily as references in secondary literature (as requests for government documents were unsuccessful), this thesis seeks to answer the research question: ***Do current conditions warrant the continued coordination of CANUS defence relations via the PJBD? If so, why is the PJBD not meeting more frequently? The hypothesis is that the PJBD, while still valuable, has been superseded by other arrangements that are more issue specific and bring together technocrats, rather than civilian advisors. Whether or not this is desirable is not the question. Rather, this thesis seeks to answer whether the PJBD still has a viable role.***

²³ Bi-National Planning Group, *The Final Report on Canada and the United States (CANUS) Enhanced Military Cooperation*, (Peterson Air Force Base, Colorado Springs: 13 March 2006), <https://www.hsdl.org/?view&did=462647>.

²⁴ Fortmann and Haglund, "Canada and the Issue of Homeland Security: Does the 'Kingston Dispensation' still hold?," 19-21.

²⁵ Beatty, *The Canada-United States Permanent Joint Board on Defence*, 32-37.

The research question will be answered by achieving three objectives: First, analysis of the PJBD's role throughout three time periods (1927-1945, 1946-1991, 1992-2023) will be conducted using background information found by conducting a comprehensive review of the scholarly literature. The three time periods correspond to major geopolitical inflection points. Second, this thesis further seeks to piece together the story of PJBD activity (within the public and declassified realm) that is in disparate parts and scattered throughout the literature – sometimes with obscure references found in memoirs and footnotes. This will provide future scholars and those with interest a one-stop-shop for all matters PJBD. Third, by compiling this information in a singular place, one can assess the Board's future relevancy including if it has been relegated in favour of other institutions, as much of the literature suggests. Additionally, answering the research question will address a crucial post-Beatty gap in the literature which does not discuss any PJBD advice provided since 1964. This thesis also seeks to assist decision-makers and policy analysts with a deeper understanding of the nature and issue areas of historical CANUS defence cooperation given the current threat context, highlighting the Board's ability to coordinate defence activities.

The current North American threat context and rising geopolitical tensions have not been this concerning in decades. The return of Great Power Competition has been compared to a regrowing jungle.²⁶ Technological research and development of advanced weaponry, hybrid warfare below the conventional threshold, challenges to American hegemony, and reduced public trust in international security institutions have contributed to this context. Current North American early warning defences, such as the North Warning System (NWS), are incapable of adequately detecting new kinds of airborne threats to the continent. The gaps in capabilities and seams of command and control inherent to the US Unified Command Plan (UCP) are all potential issues for

²⁶ Robert Kagan, *The Jungle Grows Back: America and Our Imperiled World* (New York: Alfred Knopf, 2018).

the PJBD to consider.²⁷ The year 2023 is an inflection point to rethink what the defence of North America entails.²⁸ Continental defence has become a priority for Ottawa and Washington given the geopolitical tensions; a better understanding of the legacy of advice provided by the PJBD is needed to ascertain its historical legacy, reasons for its reduced role, and to contextualize its future.

While the PJBD represents a “longstanding, well-entrenched relationship, rooted in deep trust, and can be easily underestimated as a forum to highlight problems and seek consensus on approaches or solutions to delicate political issues that can be proposed to the President and Prime Minister for decision,”²⁹ there is no guarantee of its continued utility or existence. Geopolitical tensions today resemble the past, when continental defence became a renewed priority due to regional tensions elsewhere. In 1949, amidst the Korean War, the Communist regime taking power in China, and Soviet nuclear testing, the PJBD's utility as a deliberative political-military body was most apparent. As geopolitical tensions peak and wane over time, the PJBD seems to function best when external factors dictate the necessity and urgency of its agenda. Beatty's case study of the 1949 geopolitical environment makes the most compelling comparison to support the role of the PJBD moving forward.³⁰ If not now given the international security environment, then what other context would reinvigorate the PJBD?

²⁷ Andrea Charron and Nicholas Glesby, “After 80 years of advice, joint body’s work on North American defence as necessary as ever,” *The Hill Times*, 19 August 2020, <https://www.hilltimes.com/2020/08/19/after-80-years-of-advice-joint-bodys-work-on-north-american-defence-as-necessary-as-ever/260280>.

²⁸ Andrea Charron and James Fergusson, “North America’s Imperative: Strengthening Deterrence by Denial,” *Strategic Studies Quarterly* (Winter 2021): 42-43; Andrea Charron, “Beyond the North Warning System,” *War on the Rocks*, 7 September 2020, <https://warontherocks.com/2020/09/beyond-the-north-warning-system/>.

²⁹ P. Whitney Lackenbauer, “Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty,” *North American and Arctic Defence and Security Network*, 16 August 2020, <https://www.naadsn.ca/wp-content/uploads/2020/08/20-Aug-Lackenbauer-PJBD-at-Eighty.pdf>.

³⁰ Beatty, *The Canada-United States Permanent Joint Board on Defence*, 63-64.

1.2: Methodology

This thesis will scan the existing literature for background analysis to provide a narrative of the PJBD's evolving role in continental defence planning from inception. The scan is drawn from an extensive literature review of primary government documents, secondary academic sources, such as monographs, texts, peer reviewed journal articles, and tertiary current affairs' news media. The goal is to provide scholars and practitioners with a one-stop shop on the historical legacy and relevance of the PJBD in the 21st century.

The core part of this research involves compiling the formal PJBD Recommendations made during WWII, the formal Recommendations made after the War (which essentially stop in 1953), and charting the PJBD's advice and guidance to the Prime Minister and President from 1954 to present day. All formal recommendations are, to the greatest ability given available information, recorded with full explanation and placed in a short-form table. The wartime recommendations are adapted from US Colonel Stanley W. Dziuban's foundational *Military Relations Between the United States and Canada, 1939-1945*, in which he accessed declassified PJBD material from 1940-1945 in 1959.³¹

An extensive review of the foundational literature is explained in Chapter 2.2. This provides the foundation and basis to better understand the PJBD's constantly evolving role in continental defence planning, and the difficulty in attaining PJBD records for analysis reflective of its secret classification and lack of public communiqués or media presence.

³¹ Stanley W. Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, (Washington, D.C.: Office of the Chief of Military History - Department of the Army, 1959).

1.3 Thesis Organization

The first chapter explains the rationale for study, research question, a brief explanation of the PJBD, and methodological approach. The second chapter contains an extensive review of twelve foundational pieces of literature to provide a basic understanding of the PJBD structure and contextualizes the key PJBD sources used in this research. The third chapter discusses the foundations and historical context of the Canada-US defence relationship, that serves as the background to the creation of the PJBD. It begins in 1927 with the establishment of the Canadian legation in Washington, D.C., the personal diplomacy between Mackenzie King and Franklin Roosevelt, the paramount 1938 Kingston Dispensation and Canadian Corollary, the 1940 Ogdensburg Agreement, and, the PJBD's thirty-three formal wartime recommendations.

The fourth chapter examines the PJBD during the Cold War and represents a crucial update to the literature since David Beatty's 1969 Ph.D. dissertation entitled *The Canada-United States Permanent Joint Board on Defense*. The time between Beatty and now means that over 50 years of PJBD history has not been compiled. While the limits of an M.A. thesis means only a brief overview is possible, chapter four serves as an update on where Beatty left off and is a new contribution to the literature. The PJBD during the latter half of the Cold War is reflective of incremental changes to the CANUS defence relationship, with a particular focus on subsequent NORAD renewals – a major preoccupation for both states. Given that this thesis is not within the history discipline, and the scope of recounting PJBD movement is prevented by arduous government declassification requests that would likely take years to receive (as Library and Archives Canada, Global Affairs Canada, and the Department of National Defence have not provided any documents after Access to Information and Privacy (ATIP) requests in September

2022), this chapter seeks to serve as a general overview of PJBD meeting agendas from 1946 to 1991.

The fifth chapter examines the PJBD's role post-Cold War, amidst a shift to American hegemony, 9/11, and the return of Great Power Competition around 2014. This chapter also includes analysis of the PJBD's infrequent use during the 2022 invasion by Russia of Ukraine and the current NORAD Modernization cycle. Additionally, analysis of the new US co-Chair selection in 2021 and the Ministerial 2+2 format as a potential alternative format for the Board's future is included.

The sixth chapter will serve as the conclusion with policy recommendations for senior decision-makers, on the importance of the PJBD, where political-technical decisions can be jointly discussed in a "frank, informal, off-the-record exchange of views" away from the media spotlight.³² This will be examined in the context of the role of advice-providing bodies and their contemporary role in policy-making. The thesis will conclude with reflections on the PJBD's future role in continental defence planning.

The bibliography will also function as a comprehensive source for future scholars who wish to examine the PJBD. The bibliography is a useful update for future academic interest, as there has not been a single source since Beatty's 1969 dissertation. Additionally, Appendices A to F will also be of use for future scholars. Compiled are: the list of co-Chairs from 1940 to 2023 (A); formal recommendations of the Board from 1940-1964, found within Beatty and Conliffe's work (B); meeting dates and locations from 1940-1963, also found within Beatty's dissertation (C); membership from 1940-1963, again found within Beatty's dissertation (D); a shortened table of the formal recommendations from 1940-1964.

³² Lackenbauer, "Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty," 4.

Chapter 2: Setting the Foundation

2.1 Structure and Composition of the PJBD

The Canada-United States Permanent Joint Board on Defence (PJBD) is a civilian defence advisory body that issues recommendations and advice on mutual continental defence issues to the Canadian Prime Minister and US President. Since its creation via the Ogdensburg Agreement in 1940,³³ the Board has studied, advised, and consulted on important North American defence issues such as the defence of Newfoundland and construction of the Alaska Highway in WWII,³⁴ the St. Lawrence Seaway and Power Project, Command and Control (C²) arrangements for NORAD,³⁵ successive NORAD renewal agreements,³⁶ the Y2K bug in 2000,³⁷ and, continued support for NORAD's maritime warning after 2006.³⁸

The PJBD's membership composition has evolved over time and is split into two sections (a Canadian Section and an American Section). Today, it consists of two co-Chairs, a Canadian and American, appointed by the Prime Minister and the President, respectively. Canadian Department of National Defence (DND) and US Department of Defense (DoD) representatives, typically at the Assistant Deputy Minister for Policy (ADMPol) and Assistant Secretary of Defense for International Security Affairs (ASD/ISA) level, representatives from the Canadian and US Joint Staffs, representatives from the Tri-Command Framework institutions of Canadian Joint Operations Command (CJOC), NORAD, and US Northern Command (USNORTHCOM),

³³ See Appendix F.

³⁴ See Appendix B, PJBD Recommendations: 2, 3, 5, 8, 14, 15, 16, 17, 18, 20, 26, and 30.

³⁵ See Appendix B, PJBD Recommendation 48/1, 51/2, 51/4, and 53/1.

³⁶ Lackenbauer, "Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty," 4.

³⁷ Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint?" 6.

³⁸ Andrea Charron, James Fergusson, and Nicolas Allarie, "'LEFT of BANG': NORAD's Maritime Warning Mission and North American Domain Awareness," *Centre for Defence and Security Studies*, 8 October 2015, 17, https://umanitoba.ca/centres/media/0_NORAD_Maritime_Warning_Mission_Final_Report_8_Oct_2015.pdf.

representatives from Global Affairs Canada and the State Department, representatives from Public Safety Canada and the Department of Homeland Security, representatives from the Privy Council Office (PCO) and National Security Council (NSC), representatives from the Canadian and US Embassies,³⁹ and, since at least 2011, the Canadian and US Coast Guards have also had representatives sit-in on meetings.⁴⁰ The dual-hatted Commander (or representative) of NORAD and USNORTHCOM and the Commander of CJOC attend as needed.⁴¹ The agency and department in the meeting changes relative to the agenda of the day – a key function of the PJBD’s flexibility.

PJBD Secretaries record classified meeting minutes and produce journals of the discussions that take place.⁴² The co-Chairs then submit their reports, sometimes in writing and sometimes in person, to the Prime Minister and Minister of Defence (and formerly the War Cabinet) and the President and Secretary of Defense.⁴³ The role of the Secretary has evolved from a dual role for representatives from the State Department and External Affairs (now Global Affairs), to a full-time Secretary that also came from State and External Affairs but was a separate person and

³⁹ Charron, “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint?” 4.

⁴⁰ Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.

⁴¹ Charron, “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint?” 4.

⁴² Department of National Defence Directorate of History DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence, 1940-1960*, (Ottawa: Queen’s Printer, 1960), 13, 16; Note that in Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” DHIST 82/820 is cited as: C.P. Stacey, *A Brief History of the Canada-United States Permanent Joint Board on Defence, 1940-1960* (Ottawa: Queen’s, 1960); However, the DND Directorate of History version does not specify Stacey as the author.

⁴³ Charron, “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint?” 4; Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.; Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 366.

position.⁴⁴ It is now a full-time Secretary from the Defence departments that is also separate from the representative for both sections.⁴⁵

Even as the PJBD has no executive authority or ability to make policy, its key function is to make formal recommendations (which it continues to do so today) and provide advice. Three factors allow the Board this mandate. First, the PJBD has access to knowledgeable technocrats who serve as a function of their position within the department, agency, or service they represent. Second, the co-Chairs are handpicked by the Prime Minister and the President, respectively. This allows the co-Chairs access to the executive to expedite pressing defence and security concerns from a trusted source for quick action reducing bureaucratic obstacles and barriers. Bureaucrats (also known as public or civil servants) are non-partisan hires responsible for implementing government policies and for the day-to-day management of government services underneath the direction of an elected official (Minister in Canada and Secretary in the United States).⁴⁶ Military representatives are also bureaucrats, albeit special because of their unlimited liability. Third, the relative secrecy of the PJBD allows for frank and sensitive discussions away from media spotlight and public access. The Board “strives to forge a continental vision unconstrained by bureaucratic stovepipes.”⁴⁷

PJBD meeting agendas are often “brought forward,” or set by the Secretaries and Board members from previous meeting agendas. Direction on the agenda is also coordinated between the Department of National Defence Assistant Deputy Minister for Policy (ADMPOl) in Canada and OSD(P) (Office of the US Secretary of Defense for Policy) in the United States. A co-Chair leads

⁴⁴ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 64; DHSIT 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 16.

⁴⁵ Charron, “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint?” 4.

⁴⁶ “Bureaucracy in Canada,” *The Canada Guide*, accessed 10 August 2023, <https://thecanadaguide.com/government/bureaucracy/>.

⁴⁷ Charron, “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint?” 6.

the meeting (typically the host country unless a co-Chair is absent) by calling items to order. Experts providing testimony are also invited to provide context relative to the agenda of the day. In Canada, there was no direct involvement on the meeting's agenda from either the Privy Council Office (PCO) or the Office of the Prime Minister (PMO).⁴⁸ It is unclear whether the White House or National Security Council (NSC) has any involvement today, but after 1947, the PJBD Journals (essentially the meeting minutes) were sent to the NSC and PCO for further implementation should the governments approve the formal recommendations or take advice for future consideration.⁴⁹ Service and government representatives often provide progress reports on past PJBD recommendations and the status of their implementation, although this is unlikely the case today as the Board wasn't briefed on progress in the early 2010s as it likely happened at the ADM-Assistant Secretary levels. In recent years, the PJBD meeting are set early enough to provide both the Canadian and American Sections time to prepare their material and perspectives before the meeting occurs.⁵⁰

The Board has a broad mandate that allows it to consider defence and security topics in the “north half of the western hemisphere,” as outlined in the Ogdensburg Agreement.⁵¹ The current geopolitical environment of Great Power Competition in 2023 closely resembles the years following 1949 (when the PJBD was most active outside of WWII).⁵² The PJBD can look beyond traditional defence domains to include security concerns (such as the shared border, public health,

⁴⁸ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 85-86; Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.

⁴⁹ Raised in discussions by Dr. Joseph T. Jockel at the “The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration” in Colorado Springs in May 2023.

⁵⁰ Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.

⁵¹ See Appendix F.

⁵² Beatty, *The Canada-United States Permanent Joint Board on Defense*, 63.

or natural disasters) beyond a singular service-to-service or department-to-department level and with direct access to the executive. Therefore, in theory, it can play a crucial role for Canada and the United States in continental defence and security planning. Its flexible composition allows for incremental advice on what can be consequential defence policy for both states. The PJBD allows for a wider breadth of perspective, views, and greater collaboration for North American decision-making. These ideas will be explored further in successive chapters.

2.2 Literature Review

Since its existence, the PJBD has been the attention of little original academic focus. There are twelve foundational pieces of literature examining the Board, with nine published before the end of the Cold War and then “updates” with the fall of the Soviet Union. This literature is especially important for the historical chapters (three and four), as they provide detailed bibliographies rich with primary documents. More contemporary primary documents (not included in the literature review) will be vital for the post-Cold War, and Policy Recommendations and Conclusion chapters.⁵³

First, American Stanley W. Dziuban’s authoritative *Military Relations Between the United States and Canada, 1939-1945* was published by the Office of the Chief of Military History of the US Army in 1959.⁵⁴ While this analysis is limited to the war years only, it does provide invaluable historical access to the Board’s first 33 recommendations. Second, Canadian C.P. Stacey’s *Arms, Men and Governments: The War Policies of Canada, 1939-1945* dedicates an entire chapter to

⁵³ Such examples of contemporary documents include, but are not limited to, the following: Government of Canada, "Joint Statement from President Donald J. Trump and Prime Minister Justin Trudeau," *Prime Minister of Canada, Justin Trudeau*, 13 February 2017, <https://pm.gc.ca/en/news/statements/2017/02/13/joint-statement-president-donald-j-trump-and-prime-minister-justin>; Government of Canada, "Roadmap for a Renewed U.S.-Canada Partnership," *Prime Minister of Canada, Justin Trudeau*, 23 February 2021, <https://pm.gc.ca/en/news/statements/2021/02/23/roadmap-renewed-us-canada-partnership>.

⁵⁴ Dziuban, *Military Relations Between the United States and Canada, 1939-1945*.

Canadian military cooperation with the United States during the war.⁵⁵ These two entries are especially useful for the primary documents found within each bibliography.

The third entry was written to celebrate the PJBD's twentieth anniversary and available from the DND Directorate of History (DHIST), entitled *A Brief History of the Canada-United States Permanent Joint Board on Defence*.⁵⁶ Conliffe's 1988 article states that C.P. Stacey is the author of this document, but the DHIST copy simply states that it was written by the Canadian Army. This article contains contextual information (such as meeting locations, meeting procedure, and sentiment amongst the Board members) that is not found elsewhere.

Fourth, Dr. David Pierce Beatty dedicated his 1969 Ph.D. dissertation at Michigan State University to the PJBD. Beatty's analysis is largely centralized around post-WWII defence planning in the context of a possible Soviet nuclear attack on North America, with the Arctic as the avenue of approach. Beatty mentions that the PJBD primarily concerned itself with "execution of defense plans than with planning."⁵⁷ His dissertation is widely referenced in PJBD material from 1969 onwards. Notably, he does not mention the MCC as a reason for the PJBD's reduced agenda, although hindsight may explain this focus in current literature.⁵⁸

The fifth entry is Dr. Joseph T. Jockel's *No Boundaries Upstairs: Canada, the United States, and the Origins of North American Air Defence, 1945-1958*, the seminal work on NORAD published in 1987. As a product of Jockel's appointment as PJBD US Section Secretary in 1984-1985 and work for the State Department, he had unprecedented access to PJBD material.⁵⁹ This

⁵⁵ C.P. Stacey, *Arms, Men and Governments: The War Policies of Canada, 1939-1945*, (Ottawa: Ministry of National Defence, 1970).

⁵⁶ DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence, 1940-1960*.

⁵⁷ Beatty, *The Canada-United States Permanent Joint Board on Defence*, i-iv.

⁵⁸ Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 5.

⁵⁹ Raised in discussions by Dr. Joseph T. Jockel at "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023.

includes his analysis of “The NORAD Recommendation” of 53/1.⁶⁰ Jockel, like Conliffe, takes a more pessimistic view of the PJBD’s role after 1953.

The sixth entry is Christopher Conliffe’s 1988 article in *Canadian Defence Quarterly*, that marks fifty years since the Kingston Dispensation and Roosevelt’s unilateral security pledge.⁶¹ Conliffe also provides vital information on PJBD Recommendations, particularly those from 1946 to 1953, which receive less academic focus than do the wartime recommendations. Conliffe, who was a Visiting Defence Fellow at Queen’s University during 1988⁶² and had previously served on the PJBD, also states that the PJBD’s success cannot only be measured by the issuance of formal recommendations.⁶³

The seventh entry is Christopher Conliffe’s article in David Haglund and Joel Sokolsky’s 1989 *The US-Canada Security Relationships: The Politics, Strategy and Technology of Defense*. He argues that the PJBD had served for the last 25 years of existence in “limbo,” where it had been eclipsed by other forums and does not retain “a clear role and more executive authority.”⁶⁴ While Conliffe’s argument goes against the central argument of this thesis and is very much a product of that time, the article’s bibliography is an invaluable collection of primary historical documents and academic literature collection of the PJBD until 1989.

The eighth entry is Joel Sokolsky and J.J. Jockel’s *Fifty Years of Canada-United States Defense Cooperation: The Road From Ogdensburg*, an edited volume of essays presented at the 1990 conference of the same name, held in celebration of the 50th anniversary of the PJBD at St. Lawrence University in Canton, New York — just a few miles down the road from Ogdensburg.

⁶⁰ Jockel, *No Boundaries Upstairs*, 125.

⁶¹ Conliffe, “The Permanent Joint Board on Defence: 50 years after FDR’s Kingston Declaration,” 54-60.

⁶² “Former Visiting Defence Fellows,” *Queen’s University Centre for International and Defence Policy*, last accessed 5 June 2023, <https://www.queensu.ca/cidp/people/former-visiting-defence-fellows>.

⁶³ Conliffe, “The Permanent Joint Board on Defence: 50 years after FDR’s Kingston Declaration,” 59.

⁶⁴ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 163.

The chapters covering the personal dynamics of King and Roosevelt, CANUS defence relations during the Cold War, and relations during the 1990s all provide context for Canadian domestic political sentiment in and around 1940.⁶⁵

The ninth entry is Beatty's 1991 *The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940*, which is a condensed source of Canada-US relations in the 1930s and synthesizes his dissertation. Primarily revealing is Beatty's conceptualization of Roosevelt as having a deep understanding of the looming security crisis facing North America relative to the onset of the Second World War, and his desire to be proactive in securing American interests. Beatty also has excellent bibliographic references of historical diaries, diplomatic cables, and declassified memorandums.

The tenth piece of foundational literature is Fortmann and Haglund's 2002 *Canada and the issue Homeland Security: Does the 'Kingston Dispensation' still hold?* Written after the September 11th, 2001 attacks in New York, Virginia, and Pennsylvania, Fortmann and Haglund examine whether the status quo normative basis of CANUS cooperation would remain in a new threat environment and Washington's renewed scrutiny over homeland security.⁶⁶ This is the only piece of literature that directly focuses on the PJBD between 1991 and 2020.

The eleventh entry is Dr. Richard Goette's *Sovereignty and Command in Canada-US Continental Air Defence*. Published in 2019, Dr. Goette examines the historical foundations of Canada-US air defence and the evolution of operations from cooperation to integrated C² under NORAD. His tracing of air defence coordination is important for the PJBD, as much of the Board's action after WWII concerned the increasing integration between the Canadian and American Air

⁶⁵ J.L. Granatstein, "Mackenzie King and Canada at Ogdensburg, August 1940," in *Fifty Years of Canada-United States Defense Cooperation: The Road From Ogdensburg*, eds. Joel Sokolsky and Joseph T. Jockel, (Lewiston, New York: The Edwin Mellen Press, 1992).

⁶⁶ Fortmann and Haglund, "Canada and the Issue of Homeland Security: Does the 'Kingston Dispensation' still hold?"

Forces. Importantly, Goette has full transcriptions of PJBD Recommendations 51/4, 51/6, and 53/1.

The twelfth and final entry of foundational literature is Dr. Andrea Charron's *Centre for Defence and Security Studies* 2020 PJBD workshop report. The workshop brought together past and present PJBD co-Chairs and Canadian and US government and military officials to examine the past, present, and future of the Board in conjunction with the PJBD's eightieth birthday. The conclusion suggests that greater public attention beyond Beatty's foundational 1969 dissertation would increase its symbolic importance. However, it was also noted the inherent value of Board functions exist outside of political or media spotlight. Salient for this thesis is the acknowledgement that an increased focus on continental defence by policymakers and military decision-makers would likely bring "increased activity and attention for the PJBD." Additionally, this report contains lists of all American and Canadian co-Chairs of the PJBD, which had not yet been compiled in any other singular document since 1960.⁶⁷

All twelve of these foundational pieces of literature are especially important for the historical chapters, as they provide detailed bibliographies rich with primary documents, and comprise the current academic understanding of the PJBD. Other sources that include PJBD material will be vital for post-Cold War and contemporary analysis, but are not considered foundational as they have not had widespread impact on the existing academic literature due to their more recent publications. This thesis now turns to the foundation of the PJBD in the next chapter.

⁶⁷ Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation;" DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence, 1940-1960*.

Chapter 3: All Roads Lead to Ogdensburg (1927-1945)

3.1: O.D. Skelton's North Americanism, King, and Roosevelt

Canada came of age during the Interwar Period. Ottawa was one of the six largest trading states globally and valiantly fought for the Allied effort in World War I, to the recognition of great powers in London and Washington.⁶⁸ In 1927, Canada sent then-diplomat, and future Governor General, Vincent Massey as head of Canada's legation to Washington. This was Ottawa's first envoy independent of Britain.⁶⁹ Further cementing Canadian sovereignty in 1931, Great Britain granted Canada the autonomy to make its own foreign and defence policy via the Statute of Westminster.⁷⁰ Ottawa now had the independence to send its own representatives, diplomats, and ambassadors to pursue its national interests, but was still bound and confined by historical, cultural, and legal frameworks the British Crown used to connect its colonies across the globe.⁷¹

Canada's Department of External Affairs was led by renowned diplomat O.D. Skelton, who was the Prime Minister's "trusted confidant."⁷² The Queen's University professor was hand-picked by King for his "expert knowledge and the right point of view."⁷³ King had trouble finding trustworthy staff within External Affairs to advise him, but viewed Skelton's viewpoints and

⁶⁸ Keenleyside, *Canada and the United States: Some Aspects of Their Historical Relations*, 361-362; It is worth noting that the United States responded to an assistance request in 1917 by sending patrol boats and a flying squadron to Canada during the First World War. See: Michael Hardy and Roger Sarty, *Tin-Pots and Pirate Ships: Canadian Naval Forces and German Sea Raiders 1880-1918*, (Montreal and Kingston: McGill-Queen's University Press, 1991).

⁶⁹ Carl G. Winter, "The Establishment of the First Canadian Legation," *The Historian* 15, no. 1 (Autumn 1952), 53, 73-76.

⁷⁰ Government of Canada, "The Statute of Westminster, 1931," Intergovernmental Affairs, 5 October 2021, <https://www.canada.ca/en/intergovernmental-affairs/services/federation/statute-westminster.html>.

⁷¹ Keenleyside, *Canada and the United States: Some Aspects of Their Historical Relations*, 361-362.

⁷² John Hilliker and Donald Barry, *Canada's Department of External Affairs Volume 1: The Early Years, 1909-1946*, (Montreal and Kingston: McGill-Queen's University Press, 1990), 235.

⁷³ Norman Hillmer, *O.D. Skelton: The Work of the World, 1923-1941*, (Montreal and Kingston: McGill-Queen's University Press, 2013), 3.

perspectives⁷⁴ as invaluable assets to advance Canadian foreign policy during an era of US neutrality. Skelton and King both viewed Canada as a North American country that sought to be free of “inferior colonial status” and with the right to self-government.⁷⁵

Skelton’s intellectual acuity is the genesis of the interdependent Canadian-American relationship, and eventually the defence relationship. The lone source of disagreement in Skelton and King’s relationship was the personal view of empire. Skelton viewed himself as anti-imperialist, a staunch defender of “Canada’s ultimate independence,” but not anti-British. King remarked to Skelton at the Imperial Conference of 1923 in London that “he would fight himself for England.”⁷⁶

Having spent time in the United States as a teenager and Chicago and Philadelphia as a young adult, Skelton's worldview was predicated upon two core beliefs. First, Canada needed to remain independent of British colonial rule and able to follow “distinct national interests.”⁷⁷ Second, Skelton viewed Canada’s relationship with the republic as “bound inextricably by economics, ideas, and interests.”⁷⁸ The two core beliefs are the foundations of “North Americanism.” Historian Norman Hillmer, the expert source on Skelton, defines “North Americanism” as six distinct characteristics: the growth of American power and ambition, the resolution of mutual disputes in past centuries, the origins of a North American diplomatic structure with the International Joint Commission (IJC) as evidence of an ability to cooperatively problem solve, the influence of “continental publicists” J.W. Daffoe and J.T. Shotwell, and, the

⁷⁴ Ibid; WLMK especially liked Skelton’s Liberal Party association, “academic authority on international affairs,” views on Canadian nationalism “to build an independent national spirit” and that Canada should “take on the work of the world.”

⁷⁵ Norman Hillmer, “O.D. Skelton and the North American mind,” *International Journal* 60, no. 1 (Winter 2004-2005): 100.

⁷⁶ Hillmer, *O.D. Skelton: The Work of the World, 1923-1941*, 12.

⁷⁷ Ibid., 7; Hillmer, “O.D. Skelton and the North American mind,” 96.

⁷⁸ Ibid.

free-flow of goods, culture, and people across the border made possible by the Canadian-American Free Trade Agreement of 1935.⁷⁹

In 1935, King, the first Canadian-born Prime Minister, was re-elected after five years of R.B. Bennett's tenure. King's Liberal party had begun to seek a closer relationship with the United States that grew out of formal channels and the friendly relations between the respective Heads of Government.⁸⁰ Franklin Roosevelt, elected in his first of four terms as President of the United States in 1932, had a sentimental connection to Canada.⁸¹ Similarly, King's matriculation in economics at Harvard and the University of Chicago, before rapidly ascending to Deputy Minister of Labour in 1900, gave him a unique view of the United States from the perspective of a Canadian.^{82 83}

Skelton, Roosevelt, and King were all a similar age and were exposed to the cultural and societal difference of living outside their home countries. Importantly, Skelton and King had fostered an interpersonal relationship that cut across diplomatic and bureaucratic channels that often burden the workflow between senior decision-makers and the executive branch. Ironically, even though King thought it obsequious behaviour to appease and flatter Roosevelt,⁸⁴ he forged a relationship with the President far closer than any previous Prime Minister had.

⁷⁹ Hillmer, "O.D. Skelton and the North American mind," 93-94, 96.

⁸⁰ Keenleyside, *Canada and the United States: Some Aspects of Their Historical Relations*, 365.

⁸¹ National Park Service, "Roosevelt Campobello International Park," *US Department of the Interior*, last accessed 12 December 2022, https://www.nps.gov/nr/travel/presidents/roosevelts_campobello.html; Roosevelt's Campobello Island home in New Brunswick was the source of his summer vacations for 56 years. His childhood in Canada included swimming and sailing, and his own children spent their summers on the island. While swimming in 1921, Roosevelt contracted polio and was forever bound to a wheelchair.

⁸² H. Blair Neatby, Tabitha de Bruin, Andrew McIntosh, "William Lyon Mackenzie King," *The Canadian Encyclopedia*, 4 February 2021, <https://www.thecanadianencyclopedia.ca/en/article/william-lyon-mackenzie-king>.

⁸³ It is public belief, although contested, that King and Roosevelt forged an acquaintanceship while studying at Harvard as the origin for the first-name basis of their relationship. Regardless, King closely followed Roosevelt's re-election campaign in 1936, and elatedly celebrated the "magnificent victory" of "our friend." See: Beatty, *The Canada-United States Permanent Joint Board on Defense*, 13; James Eayrs, *In Defence of Canada: Appeasement and Rearmament*, (Toronto: University of Toronto Press, 1965), 41, 199-200.

⁸⁴ Perras, "'Keen to Foul Their Own Nests': Contemporary and Historical Criticism of the Permanent Joint Board on Defence of 1940," 44.

3.2: Personal Diplomacy

By June 1934, Roosevelt had become increasingly concerned about the ability of the British Empire to defend its dominions. By 1936, he was specifically concerned about Canada's ability to defend its coastlines.⁸⁵ The British considered appeasing the Japanese navy's regional influence in November 1934, which would disrupt American naval influence in the Asia-Pacific region. This proposed policy prompted Roosevelt to tell the British he would be "compelled, in the interest of American security" to clearly inform and ensure the Canadians (and Australians, South Africans, and New Zealanders) understood their future security was linked to the United States.⁸⁶ The British "disavowed" the deal with Tokyo.⁸⁷ In the process, Roosevelt essentially declared his own continental defence doctrine. The United States would defend any state to protect its security and national interests, regardless of the legal or historical connotations of that state to other great powers.

Over the 1933-1945 Roosevelt administration, the President and Prime Minister met 19 times.⁸⁸ For the first of two meetings, King travelled with an advisor and met with Roosevelt for over six hours on 8-9 November 1935.⁸⁹ The meetings resulted in the resumption of reciprocal trade negotiations, first suspended because of the March 1935 Canadian federal elections. After

⁸⁵ Galen Roger Perras, "Future plays will depend on how the next one works": Franklin Roosevelt and the Canadian Legation Discussions of January 1938," *Journal of Military and Strategic Studies* 8, no. 4 (Summer 2006): 4; Robert Dallek, *Franklin D. Roosevelt and American Foreign Policy, 1932-1945, With a New Afterword* (Oxford, Oxford University Press, 1995), 89; Granatstein, "Mackenzie King and Canada at Ogdensburg, August 1940," 26 (Endnote 1).

⁸⁶ Beatty, "The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940," 3.

⁸⁷ Perras, "Future plays will depend on how the next one works", 4; Robert Dallek, *Franklin D. Roosevelt and American Foreign Policy, 1932-1945, With a New Afterword* (Oxford, Oxford University Press, 1995), 89.

⁸⁸ Roger F. Swanson, *Canadian-American Summit Diplomacy, 1923-1973: Selected Speeches and Documents*, (Toronto: McClelland and Stewart, 1975), 39.

⁸⁹ *Ibid.*, 37.

returning to Ottawa to consult Cabinet, King and Roosevelt signed the trade agreement in Washington on 15 November.⁹⁰ Reporters remarked on the “informality” between the two.⁹¹

On 31 July 1936, Roosevelt, and his eldest son James, made the first official presidential visit to Canada.⁹² They were toured around Quebec City by the Governor General Lord Tweedsmuir and King.⁹³ Before reciprocating with the Governor General’s late March 1937 visit to the White House,⁹⁴ Roosevelt spoke at Chautauqua, New York on 14 August 1936. Addressing the topic of international peace and security, he reiterated his 1933 inaugural address and “Good Neighbor” policy that sought to balance American foreign policy between intervention and neutrality. He highlighted the Canada-US border as an example of “mutual trust” and “the noblest monument to peace and to neighborly economic and social friendship.”⁹⁵ Canada was described as a “good neighbor,” thanks to “mutual trust” and “3,000 miles of friendship with no barbed wire, no gun or soldier, and no passport on the whole frontier.”⁹⁶

Roosevelt conceptualized his address as further advocating for principles of democracy, peace, freedom, and the expansion of liberal international trade as a means of neutrality amidst the

⁹⁰ Ibid., 37-38.

⁹¹ Ibid., 38.

⁹² US President Warren G. Harding visited Vancouver for an “official reception” while returning to the United States after Alaska, shortly before his death, on 26 July 1923. This was the first time a US President, while in office, had stepped foot on Canadian soil. Harding acknowledged the “advancement and admire your independence [...] (and) friendship.” See Robert C. Belyk, “President Harding’s Last Stand,” *Canada’s History*, 17 January 2017, <https://www.canadashistory.ca/explore/politics-law/president-harding-s-last-stand>; Swanson, *Canadian-American Summit Diplomacy, 1923-1973*, 37; Office of the Historian, “Presidential and Secretaries Travels Abroad, Canada,” *US Department of State*, last accessed 14 December 2022, <https://history.state.gov/departmenthistory/travels/president/canada>.

⁹³ Eayrs, *In Defence of Canada: Appeasement and Rearmament*, 41; Office of the Historian, “Presidential and Secretaries Travels Abroad, Canada.”

⁹⁴ J. William Galbraith, “Galbraith: What Lord Tweedsmuir’s story teaches Canada about challenging times,” *Ottawa Citizen*, 11 February 2020, <https://ottawacitizen.com/opinion/columnists/galbraith-what-lord-tweedsmuir-story-teaches-canada-about-challenging-times>; The New York Times, “Tweedsmuir Off to Washington,” 30 March 1937, <https://uml.idm.oclc.org/login?url=https://www.proquest.com/historical-newspapers/tweedsmuir-off-washington/docview/102084856/se-2>.

⁹⁵ Franklin D. Roosevelt, “Address at Chautauqua, N.Y.,” *The American Presidency Project at the University of California Santa Barbara*, 14 August 1936, <https://www.presidency.ucsb.edu/documents/address-chautauqua-ny>.

⁹⁶ Ibid.

growing tensions in Europe.⁹⁷ It received little attention in the Canadian press or society at-large but did foreshadow future discussions between the two states.⁹⁸ Between this address and visit two weeks prior, Roosevelt had made close relations with Canada a key tenant of his foreign policy.

King desired to make his own foreign and defence policy decisions away from the watchful eye of the United Kingdom. Dejectedly viewing the European security crisis as a result of British rearmament policy,⁹⁹ he visited Washington in early March 1937. The Prime Minister met with Roosevelt and Secretary of State Cordell Hull. The main point of discussion was the “European situation” and the belief “that war was inevitable within two years.”¹⁰⁰ Hull viewed King as an interlocutor between Washington and London and expressed his trust and faith in him to accurately relay the administration’s viewpoint to the British.¹⁰¹ This was the first time Atlantic and Pacific coastal defences were discussed between King and Roosevelt.¹⁰² After the meeting, King rationalized the discussions as necessary when he traveled to the Imperial Conference in London two months later.¹⁰³ It was increasingly apparent that Washington’s security concerns over how to defend North America began to take precedence for King over British issues.

Roosevelt visited Canada again in September 1937, transiting from Seattle to Victoria aboard a US destroyer. After discovering the scant condition of Canada’s naval forces in the Pacific, he quickly recommended that Canada and the United States exchange military intelligence between the respective General Staffs. Roosevelt was deeply alarmed at the state of the Canadian Navy. The President viewed the British Columbian coastline as a link between Alaska and the

⁹⁷ Ibid.

⁹⁸ Frederic Hubert Soward, Joseph Frederick Parkinson, Norman Archibald MacRae MacKenzie, *Canada in World Affairs: The Pre-War Years*, (Oxford: Oxford University Press, 1941), 107.

⁹⁹ Cordell Hull, *The Memoirs of Cordell Hull*, Vol. 1 (New York: The Macmillan Company, 1948), 527-528.

¹⁰⁰ Ibid.

¹⁰¹ Eayrs, *In Defence of Canada: Appeasement and Rearmament*, 42.

¹⁰² Swanson, *Canadian-American Summit Diplomacy, 1923-1973: Selected Speeches and Documents*, 39. See Beatty, *The Canada-United States Permanent Joint Board on Defense*, 4.

¹⁰³ Swanson, *Canadian-American Summit Diplomacy, 1923-1973: Selected Speeches and Documents*, 39.

continental United States. The first contacts between Canada's National Defence and the US Department of War were made in January 1938 in Washington, where the Strait of Juan de Fuca received the most attention as a potential vulnerability to Japanese attack.¹⁰⁴

By the beginning of 1938, Roosevelt and King had forged a closer relationship than any previous Prime Minister had enjoyed with an American President. The deteriorating security situation in Europe and Canada's dismal naval capabilities on both coasts created great consternation. Roosevelt was unnerved that the United States could be invaded by either or both the Nazis and Japanese because of Canada's weak defences. It was not long before Canada was required to respond to Roosevelt's concerns.

3.3: The Kingston Dispensation and Canadian Corollary

By 18 August 1938, the security environment in Europe had worsened. The Sudeten Crisis,¹⁰⁵ in now-Czechia, had its origins in Nazi aggression and now involved the British and French in complicated negotiations. On this day, Roosevelt travelled to Ontario to dedicate the Thousand Islands Bridge at Ivy Lea, alongside King. Here he called for co-development of projects on the St. Lawrence.¹⁰⁶ Later that day, they traveled to Kingston where Roosevelt was to accept an honorary degree from Chancellor James Richardson at Queen's University.¹⁰⁷ Roosevelt, reading from his own handwritten scribbles and interjections on the draft made by State Department officials,¹⁰⁸ delivered the most remarkable of pledges while on stage:

¹⁰⁴ C. P. Stacey, "The Canadian-American Permanent Joint Board on Defence, 1940-1945," 108-109; See: David Beatty, "The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940," *The Northern Mariner* 1, no.1 (January 1991): 4, https://www.cnrs-scrn.org/northern_mariner/vol01/tnm_1_1_3-22.pdf.

¹⁰⁵ The Sudeten Crisis of 1938 was the result of Hitler's aggressive stance in support of the pro-German ethnic minority in neighbouring Czechoslovakia, resulting in the British and French appeasing German annexation of the region.

¹⁰⁶ Swanson, *Canadian-American Summit Diplomacy, 1923-1973: Selected Speeches and Documents*, 39.

¹⁰⁷ Beatty, "The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940," 4.

Reuters, "CANADA: President Roosevelt pledges war aid to Canada, if attacked (1938)," *British Pathé*, accessed 14 December 2022, <https://www.britishpathe.com/video/VLVA7Z3TKUBT5K7RHIUM5CKQA9Z5I-CANADA-PRESIDENT-ROOSEVELT-PLEDGES-WAR-AID-TO-CANADA-IF-ATTACKED>.

¹⁰⁸ Eays, *In Defence of Canada: Appeasement and Rearmament*, 183.

The Dominion of Canada is part of the sisterhood of the British Empire. I give to you assurance that the people of the United States will not stand idly by if domination of Canadian soil is threatened by any other Empire. We as good neighbors are true friends because we maintain our own rights with frankness, because we refuse to accept the twists of secret diplomacy, because we settle our disputes by consultation and because we discuss our common problems in the spirit of the common good. We seek to be scrupulously fair and helpful, not only in our relations with each other, but each of us at home in our relations with our own people.¹⁰⁹

Referred to as the “Kingston Dispensation” by political scientists David Haglund and Michel Fortmann,¹¹⁰ Roosevelt’s proclamation evoked raucous applause and found widespread support at home.¹¹¹ King was in the audience but did not respond as the pledge demanded reflection.

Two days later in Woodbridge, Ontario, the Prime Minister responded to Roosevelt’s speech with the following:¹¹²

We, too, have our obligations as a good and friendly neighbour, and one of them is to see that, at our instance, our country is made as immune from attack or possible invasion as we can reasonably be expected to make it, and that should the occasion ever arise, enemy forces should not be able to pursue their way, either by land, sea or air to the United States across Canadian territory.¹¹³

Historian David Beatty refers to King’s response as the “Canadian Corollary,” representing the delicate situation to which Canada had to respond.¹¹⁴

The President’s pledge of a unilateral defence and security guarantee was a watershed moment in Canada-US relations. The chief concerns were that Canada would become overrun with Japanese forces in British Columbia and Nazis in the Maritimes, both of which posed an enormous threat to the United States. Roosevelt feared that if Canada were to send men and materiel to

¹⁰⁹ Roosevelt, “The Great Communicator;” Historian Beatty coins Roosevelt’s speech as “The Kingston Dispensation.”

¹¹⁰ Fortmann and Haglund, “Canada and the Issue of Homeland Security: Does the ‘Kingston Dispensation’ still hold?” 17-22.

¹¹¹ Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 4; Reuters, “CANADA: President Roosevelt pledges war aid to Canada, if attacked (1938).”

¹¹² See: Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940.”

¹¹³ Eays, *In Defence of Canada: Appeasement and Rearmament*, 183-184.

¹¹⁴ Beatty terms King’s response and predicament the Canadian Corollary. See Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940.”

support the defence of Britain, that a vacated Canada created a profound security vacuum and existential threat to the American state. Roosevelt recognized the evolving dynamics of European security from Hitler's rhetoric and actions in the Sudetenland, combined with the history of secret alliances and devastation wrought by the First World War. The President was desperately worried about an impending crisis brought by Europe's vulnerability. Existing academic literature portrays Roosevelt as deeply worried, with a keen sense of foresight and fear of what a European war could mean for the world.¹¹⁵

For King, Roosevelt's unsolicited unilateral defence guarantee created a conundrum.¹¹⁶ Even though King had the foresight to recognize growing American influence and power, the Prime Minister was still constitutionally, culturally, and domestically obligated to help the British Empire defend itself. This meant Canada, a small country with fewer than 12 million people, now had to respond to the security needs of two great powers.¹¹⁷ The response implicitly committed Canada to closer defence ties with the United States and that Ottawa could not be a weak link in the developing defence partnership.¹¹⁸

King was pleased with his response. He thought that the Americans would appreciate the position and "he had been able to spell out Canada's strategic obligations."¹¹⁹ He wrote in his diary:

¹¹⁵ For a comprehensive account, see: Galen Roger Perras, *Franklin Roosevelt and the Origins of the Canadian-American Security Alliance, 1933:1945: Necessary, but Not Necessary Enough* (New York: Praeger, 1998).

¹¹⁶ James Fergusson, "Defence and Security in the Arctic," *Vardberg and the Institute of International Affairs at the University of Iceland*, 24 November 2021, starts at 15:18, <https://www.youtube.com/watch?v=sc6Ag4kwda0>.

¹¹⁷ Keenleyside, *Canada and the United States: Some Aspects of Their Historical Relations*, 361-362.

¹¹⁸ It is worth noting that Nils Ørvik's 1973 "Defence Against Help" argument is purposefully excluded from this analysis. For more, see: Andrea Charron and James Fergusson, "Canada and Defence Against Help: The Wrong Theory for the Wrong Country at the Wrong Time," in *Canadian Defence Policy in Theory and Practice*, edited by Thomas Juneau, Phillippe Lagassé, and Srdjan Vuceitc, (Cham, Switzerland: Palgrave MacMillan, 2020), 99-118.

¹¹⁹ Beatty, "The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940," 5.

I think at last we have got our defence programme in good shape. Good neighbour on one side; partners within the Empire on the other. Obligations to both in return for their assistance. Readiness to meet all joint emergencies.¹²⁰

Canada's forces were not adequately prepared in either capacity or capabilities. Regulars and militia totalled just over 55,000 personnel in July 1939.¹²¹ Skelton viewed a Japanese invasion of British Columbia unlikely, countering the President's analysis.¹²² Roosevelt told King in private that "the inadequacy of the defence of Canada on both the Atlantic and Pacific" jeopardized US security.¹²³ Additionally, there was no military liaison between the two countries during the "critical" years of January 1938 until July 1940.¹²⁴ Canadian defences painted a bleak picture at a time of rising complexity and increasing alarm.

3.4: Europe goes to War

Roosevelt and King's statements were the first time either state had outlined the recognition, obligations, and expectations of continental defence.¹²⁵ Historian Beatty simply states the "Canadian Corollary" still stands as the clearest and most sweeping pronouncement of Canadian-American bilateral defence commitments."¹²⁶ This remains true 85 years later.

The President and Prime Minister next met in Washington in November 1938 to extend the trade agreement signed three years prior. An official trade agreement between the United States and Great Britain with respect to their colonies was signed at the same time, representing the

¹²⁰ C.P. Stacey, *Arms, Men and Governments: The War Policies of Canada, 1939-1945*, (Ottawa: Ministry of National Defence, 1970), 99.

¹²¹ J.L. Granatstein, *Canada's War: The Politics of the Mackenzie King Government, 1939-1945*, (Toronto: University of Toronto Press, 1975), 8.

¹²² Beatty, "The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940," 9. Norman Hillmer, *O.D. Skelton: A Portrait of Canadian Ambition*, (Toronto: University of Toronto Press, 2015), 316.

¹²³ Beatty, "The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940," 9.

¹²⁴ Eays, *In Defence of Canada: Appeasement and Rearmament*, 202.

¹²⁵ Beatty, "The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940," 5.

¹²⁶ Ibid.

influence of London in burgeoning Canada-US relations.¹²⁷ The next day, Roosevelt indicated to the press that King “had agreed to further negotiations for the improvement of the St. Lawrence River as a seaway to the Great Lakes.”¹²⁸ Days after the signing, Roosevelt said that “the United States intended to defend the American continent from an air attack and that he believed Canada would join in furthering a defence scheme to this end.”¹²⁹

Roosevelt, and his Naval Operations Chief William Leahy, began to address the need for US foreign bases to protect the continent. By March 1939, Trinidad, St. John’s, Halifax, Bermuda, St. Lucia, and other British colonial entities as well as Brazil were all under consideration.¹³⁰ In June 1939, Roosevelt hosted King George VI at Hyde Park (the President’s New York residence), where Mackenzie King was included in discussions.¹³¹ The British granted Roosevelt access to its colonial bases in July 1939 for “western Atlantic patrol,” which included fuel reserves, equipment, and stores’ replenishment. King was informed after the fact.¹³²

August 1939 saw the clearest indication of war in Europe. While visiting Halifax on August 20th, the State Department advised Roosevelt to return to Washington immediately. Intelligence on a Nazi-Soviet Non-Aggression Pact revealed that the two states would formally sign it in the coming days, signaling an escalation of the tensions in Europe. That afternoon, the US Navy (USN) signed leases for bases in St. Lucia and Trinidad.¹³³ The USN was hoping for a similar agreement for Halifax, but King objected given that Nova Scotia was part of sovereign Canada.

¹²⁷ Swanson, *Canadian-American Summit Diplomacy, 1923-1973: Selected Speeches and Documents*, 40.

¹²⁸ *Ibid.*

¹²⁹ Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 5.; Stanley W. Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, (Washington, D.C.: Office of the Chief of Military History - Department of the Army, 1952), 4.

¹³⁰ Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 6.

¹³¹ Swanson, *Canadian-American Summit Diplomacy, 1923-1973: Selected Speeches and Documents*, 40.

¹³² Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 7.

¹³³ *Ibid.*, 8; The Nazi-Soviet Non-Aggression Pact was signed on 24 August 1939.

O.D. Skelton advocated for Canada to accept a “war of limited liability,” where fighting would be kept as far away from Canada as possible. The protection of Canadian coasts was deemed a high priority. Wartime assistance to allies by Canada included munitions, raw materials, food, and overseas assistance to train air personnel and airplane manufacturing. King and his Cabinet approved the recommendation on 24 August, signaling that Ottawa would follow London’s prerogative into war.¹³⁴

On 3 September 1939, Britain and France formally declared war on Germany as a response to Hitler’s invasion of Poland. Canada’s most important European allies were now at war. In a display of independence from Britain, King waited until 10 September to declare war. The esteemed Canadian military historian J.L. Granatstein succinctly describes Canada’s rationale for joining the war: “The fundamental reason for this Canadian decision was sentiment. The ties of blood and culture that bound Canada to Britain proved strong enough to compel the government willingly to follow the course it did. In fact, the government had little choice. To stay neutral would be difficult legally, given the old British rights to the naval bases at Halifax and Esquimalt. To stay neutral involved an open challenge of the inadvisability of the Crown[...].”¹³⁵

King and Roosevelt next met in Warm Springs, Georgia on 25 April 1940. Roosevelt privately described that he was “disgusted” with King due to the lackadaisical Canadian effort to protect itself, given that Germany had just overtaken Denmark and Norway. King told Roosevelt on April 29th that Canada could be counted on for help.¹³⁶ Stacey described the relationship as: “the beginning of a new cooperation between the two countries, which grew more intimate as the

¹³⁴ Hillmer, *O.D. Skelton: A Portrait of Canadian Ambition*, 316.

¹³⁵ Granatstein, *Canada’s War: The Politics of the Mackenzie King Government, 1939-1945*, 19.

¹³⁶ Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 9; Morgenthau kept a secret diary of his days with Roosevelt. J.W. Pickersgill, *The Mackenzie King Record Volume 1, 1939-1944*, (Toronto, 1960), 114-115.

situation in Europe went from bad to worse following the launching of the German 'Blitzkrieg' on 10 May."¹³⁷ Beatty argues that historians have overstated the warmth of the executive relationship, pointing to this chill during Roosevelt's unease.¹³⁸ By May 1940, given the speed of the Battle of France, CANUS diplomatic and military contacts began to quickly increase, even as Washington maintained its neutrality.¹³⁹ On 23 May, the Canadian Cabinet War Committee sent all four of its naval destroyers to defend Britain. King informed Roosevelt of the decision.¹⁴⁰

Control of Paris fell to the Nazis on 14 June 1940. That day, Ottawa sent reconnaissance aircraft and an infantry battalion to Botwood, Newfoundland to protect air asset infrastructure.¹⁴¹ Newfoundland was still a colony of the United Kingdom and not yet part of Canada.¹⁴² King met with the newly appointed US Ambassador to Canada Jay Pierrepont Moffat, an experienced diplomat with years of postings in Europe and Washington. With discussions initiated by King, the two discussed the possibility of Canada-US military staff talks, given that Canadian defensive supplies of munitions, artillery planes, and materiel abroad had been depleted in France.¹⁴³ At this time, it was determined that the British fleet would move to Canada if the Nazis successfully ruled England.¹⁴⁴

A month later, on 12 July 1940, staff discussions between Canada and the United States began in Washington. The Americans gained valuable information, but discussion reached an impasse over US assistance to defend the Maritimes.¹⁴⁵ It was clear that the regular military and

¹³⁷ Stacey, *Arms, Men and Governments: The War Policies of Canada, 1939-1945*, 328.

¹³⁸ Beatty, "The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940," 9.

¹³⁹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 2.

¹⁴⁰ *Ibid.*, 3.

¹⁴¹ Beatty, "The "Canadian Corollary" to the Monroe Doctrine and The Ogdensburg Agreement of 1940," 10.

¹⁴² Newfoundland joined Canadian confederation in 1949.

¹⁴³ Eayrs, *In Defence of Canada: Appeasement and Rearmament*, 202; Beatty, *The Canada-United States Permanent Joint Board on Defense*, 4; Moffat was also the son-in-law of Joseph Grew, the US Ambassador to Japan from 1932 to 1941. See: Steve Kemper, *Our Man in Tokyo*, (Boston: Mariner Books, 2022), 68.

¹⁴⁴ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 4-5.

¹⁴⁵ Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 12.

diplomatic channels were “inadequate” to deal with joint continental defence issues.¹⁴⁶ Roosevelt suggested further contacts between heads of government was necessary. Loring Christie, the Canadian Ambassador to the United States, urged King to visit Roosevelt in Hyde Park to discuss common issues of North American defence.¹⁴⁷

Within the Canadian Cabinet in July 1940, there was a desire to help Britain with a war of limited liability and economic assistance. There was “no enthusiasm, no desire for a battle to the death with godless Nazism [...]” or to re-live the horrors of the First World War.¹⁴⁸ However, the Luftwaffe’s bombing campaign of London in 1940 changed public thought on Canada-US relations and American assistance. The Battle of Britain enabled Canadian politicians, who had resisted close ties with the United States in favour of Britain, to change tune and begin to pressure Mackenzie King for “some form of joint defense understanding with the United States.”¹⁴⁹

3.5: “Hello, is that you Mackenzie?”¹⁵⁰

During the campaign for a third White House bid, Roosevelt requested of his staff that he spend a night aboard his Presidential train on August 17th in either Canton or Ogdensburg, New York.¹⁵¹ Roosevelt understood that he would need to meet with constituents to allay their fears about the security of the United States, given the speed and scale of Nazi successes in Europe and the US’ neutral stance.¹⁵²

¹⁴⁶ Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 11.

¹⁴⁷ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 6-7.

¹⁴⁸ Granatstein, *Canada’s War: The Politics of the Mackenzie King Government, 1939-1945*, 19.

¹⁴⁹ Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 12.

¹⁵⁰ Eays, *In Defence of Canada: Appeasement and Rearmament*, 199-200; Sokolsky and Jockel, “Introduction,” in *Fifty Years of Canada-United States Defense Cooperation: The Road From Ogdensburg*, 1.

¹⁵¹ Roosevelt’s request was made on 3 August. See: Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 12.

¹⁵² *Ibid.*

US Ambassador to Canada Moffat suggested to Roosevelt he meet with King in Ogdensburg.¹⁵³ The President telephoned the Prime Minister on 16 August,¹⁵⁴ and invited him to dinner the following evening on his train to discuss “the matter of mutual defences of our coasts on the Atlantic.”¹⁵⁵ King was pleased with the invitation, but Roosevelt had already issued a statement to the press that morning. Roosevelt was communicating with both London and Ottawa concerning Atlantic defences. The press release announced his meeting with the Prime Minister.¹⁵⁶ The following day of 17 August, King and US Ambassador Moffat drove from Ottawa to Ogdensburg alone. None of King’s advisors, including Skelton, were present.¹⁵⁷

King and Moffat joined Roosevelt and US Secretary of War Colonel Henry L. Stimson on the presidential railway car as it departed for Heuvelton, New York. Roosevelt began the discussion by offering Canada destroyers-for-bases, loaned sites for naval and air capabilities, and the possibility of an American presence in the St. Lawrence or Yarmouth, Nova Scotia.¹⁵⁸ King did not agree to this, but did agree to allow the United States to utilize a port to bring in supplies, equipment, and build locks and drydocks. Importantly, to dissuade Canadian public concerns about US military on Canadian soil, Canadian artillery defences would be installed at Yarmouth port.¹⁵⁹ The President also wanted to ensure that American troops could enter Canada quickly should

¹⁵³ Ibid.

¹⁵⁴ Eayrs, *In Defence of Canada: Appeasement and Rearmament*, 199-200.; Sokolsky and Jockel, “Introduction,” 1; Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 12.

¹⁵⁵ Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 12.

¹⁵⁶ Ibid., 13.

¹⁵⁷ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 13; Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 12-13.

¹⁵⁸ Eayrs, *In Defence of Canada: Appeasement and Rearmament*, 199-200.

¹⁵⁹ Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 23-24. Beatty, *The Canada-United States Permanent Joint Board on Defense*, 16; Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 13.

Canada be attacked, and that Canadian troops have access to the Grand Trunk Railway in Maine to assist in the United States if necessary.¹⁶⁰

Roosevelt also informed King of American contributions to the Allied war effort. Fifty destroyers were sent to England, the first of which would be sent to Eastern Canada within seven days. The Americans would sail them to Canada and the British would take them across the Atlantic. Additional capabilities, such as rifles, torpedo boats, and seaplanes would be sent alongside. In his role as interlocutor, King told British Prime Minister Winston Churchill the news the next day.¹⁶¹

The establishment of a “joint defense board [to be called the Permanent Joint Board on Defence (or PJBD)] composed of representatives of Canada and the United States to discuss and develop plans for the defense of the Northern half of the Western Hemisphere” was then suggested by Roosevelt.¹⁶² It would bring together an equal number of American and Canadian personnel and be led by a co-Chair from each country. The civilians would then submit recommendations to the President and Prime Minister for their consideration.¹⁶³

There were other factors at play while drafting what would become the Ogdensburg Agreement. With tremendous foresight and giving the PJBD inherent long-term flexibility, Stimson included the words “northern half of the western hemisphere.”¹⁶⁴ Both Stimson and Roosevelt viewed the Board as politically necessary for US interests given their neutrality in the War and Canada’s role as a belligerent.¹⁶⁵ This was partially a work-around so that the United States could help Great Britain without declaring war. Stimson, Roosevelt, and King agreed to the

¹⁶⁰ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 16.

¹⁶¹ Eayrs, *In Defence of Canada: Appeasement and Rearmament*, 200.

¹⁶² Quoted in: Sokolsky and Jockel, “Introduction,” 1-2; Eayrs, *In Defence of Canada: Appeasement and Rearmament*, 199-200, 208.

¹⁶³ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 15.

¹⁶⁴ *Ibid.*, 17.

¹⁶⁵ *Ibid.*, 15-17.

word “board” over “commission” or “committee” because it did not suggest formal government appointments were required.¹⁶⁶ This avoided the necessity for Parliamentary or Congressional approval. Furthermore, King pressed Roosevelt on the use of the word “permanent.”¹⁶⁷ He feared American abandonment should Britain defeat the Nazis, ending the war quickly. Roosevelt assured him the board would be stood up “[not] to meet alone this particular situation but help secure the continent for the future.”¹⁶⁸ King was well-read on another binational board - the Canada-US International Joint Commission (IJC), which had three representatives from Canada and three from the United States to discuss mutual waterway boundary disputes. It is likely that the Prime Minister used this judicial body as a model for the structure of the new deliberative forum.¹⁶⁹

The Permanent Joint Board on Defence (or PJBD) was announced via a one-page joint press release. It is colloquially known as the “Ogdensburg Agreement.”¹⁷⁰ Issued by the White House for radio broadcast at 9 o’clock Eastern Time in the evening on 18 August 1940, it reads as follows:

The Prime Minister and the President have discussed the mutual problems of defense in relation to the safety of Canada and the United States.
It has been agreed that a Permanent Joint Board on Defense shall commence immediate studies relating to sea, land, and air problems including personnel and material.
It will consider in the broad sense the defense of the north half of the Western Hemisphere.
The Permanent Joint Board on Defense will consist of four or five Members from each country, most of them from the Services. It will meet shortly.¹⁷¹

¹⁶⁶ Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 14.

¹⁶⁷ Whether “permanent” was suggested by King or Roosevelt has been recalled differently in the historical literature. Former Canadian PJBD co-Chair Dana Wilgress suggested to Historian Beatty that messages from King to Roosevelt via Christie or Hugh Keenleyside may have contributed to its use. See: Beatty, *The Canada-United States Permanent Joint Board on Defense*, 22.

¹⁶⁸ Beatty, “The “Canadian Corollary” to the Monroe Doctrine and The Ogdensburg Agreement of 1940,” 14.

¹⁶⁹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 21. International Joint Commission. "Role of the IJC." *International Joint Commission*, last accessed 21 October 2022, <https://www.ijc.org/en/who/role>.

¹⁷⁰ Historian Beatty states that “The Ogdensburg Agreement” is the preferred Canadian term for the press release. The American preference is to replace ‘Agreement’ with ‘Declaration’. For more, see: Beatty, *The Canada-United States Permanent Joint Board on Defense*, 26; Furthermore, scholars J.J. Jockel and Joel Sokolsky briefly mention that The Ogdensburg Agreement should actually be known as “The Heuvelton Agreement,” as Roosevelt’s train departed Ogdensburg for Heuvelton, New York. See: Sokolsky and Jockel, “Introduction,” 2.

¹⁷¹ Roosevelt, “The Great Communicator.” See: Appendix F.

The Agreement was published in the Canada Treaty Series and passed by King's Cabinet as an Order-in-Council on the same day.¹⁷² In the United States, the press release was viewed as an executive agreement, although it was never published or signed as one.¹⁷³ Ogdensburg was favourably viewed in both countries, except for pushback from former Prime Minister Arthur Meighen. He "attacked the Ogdensburg Agreement [so] violently" that the Toronto Globe and Mail rejected to put his remarks in print.¹⁷⁴

The Ogdensburg Agreement is nothing short of remarkable. With its wording and conceptual influences, it assuaged political concerns about the United States violating neutrality while ensuring Canadian assistance for coastal defence was satisfied. It has stood the test of time given its broad scope and limited role to study mutual issues and provide advice and recommendations. The joint press release and prior statements in Kingston are the foundation of the CANUS defence relationship. The Board evolved from conditions created by the January 1938 impasse of joint staff discussions, the relative closeness of King and Roosevelt's relationship, and the dire situation of North American defence given Britain's peril. The strategic position Canada occupies, relative to the geostrategic environment and threats to US security, provoked the need for the PJBD.¹⁷⁵ Ogdensburg was the culmination of an evolution of American thinking: Canada was the linchpin of United States security. The military threat from Germany in the Atlantic and Japan in the Pacific rendered the PJBD a necessity.

¹⁷² Government of Canada, "Declaration by the Prime Minister of Canada and the President of the United States of America regarding the establishment of a Permanent Joint Board on Defence (known as the Ogdensburg Agreement), *Canada Treaty Series 1940/14*, 18 August 1940, <https://www.treaty-accord.gc.ca/details.aspx?lang=eng&id=100966&t=638174625047816125>.

¹⁷³ DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence, 1940-1960*, 5.

¹⁷⁴ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 34.

¹⁷⁵ Fergusson, "Defence and Security in the Arctic."

3.6: The Wartime Thirty-Three Recommendations

Spurred by the extreme sense of urgency given World War II and the lack of Canadian defences, the PJBD acted immediately. It met forty-two times during the war and issued thirty-three formal recommendations by consensus to the Prime Minister and the President.¹⁷⁶ The Board considered issues such as “joint use of facilities, troops movements on each nation’s soil of the other’s armed forces, and the drafting of joint defense plans to meet the threat of attack.”¹⁷⁷ The first meeting of the PJBD was hosted in Ottawa on 26 August 1940.¹⁷⁸ Fiorello H. LaGuardia, Mayor of New York City and a prominent supporter of Roosevelt’s New Deal, was appointed US co-Chair. The Canadian co-Chair was Colonel Oliver Mowatt (O.M.) Biggar, an experienced lawyer, former Chief Electoral Officer, and Judge Advocate General.¹⁷⁹

The Canadians and Americans were split into national sections. PJBD section membership was not a full-time position, as it was a product of military or government service.¹⁸⁰ Recommendations were made after discussion and consensus approval (there is no voting procedure), with disagreements regularly falling along service lines (i.e. the armies, navies, and air forces of both states) rather than by Canadian and American section.¹⁸¹ The PJBD’s initial membership involved the two civilian chairmen, representatives from each of Canada and the US’s Navy and Army, the Royal Canadian Air Force, US Army (Air), and US Navy (Air).¹⁸² An

¹⁷⁶ Charron, “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 5; Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 349-365. C.P. Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 122-124.

¹⁷⁷ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 16.

¹⁷⁸ The first meeting of the PJBD was to be on 22 August 1940, but was delayed after a phone call between King and Roosevelt to announce the members for each Section. See: Hugh L. Keenleyside, “The Canada-United States Permanent Joint Board on Defence, 1940-1945,” 52-53.

¹⁷⁹ LaGuardia utilized his personal friendship with Roosevelt, flying to Washington for a direct answer on “three or four” occasions. See: Keenleyside, “The Canada-United States Permanent Joint Board on Defence, 1940-1945,” 53, 55.

¹⁸⁰ Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 114.

¹⁸¹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 89-90.

¹⁸² DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence, 1940-1960*, 15-16.

additional member from the Canadian Army was added in October 1940 to equalize membership.¹⁸³ Officials from External Affairs and the Department of State acted as secretaries responsible for recording meeting minutes and journals until 1951 when each department appointed both a member and a secretary reflecting the increase in details and issues on which the Board deliberated.¹⁸⁴

In December 1940, the PJBD recommended that both sections appoint a war industry member.¹⁸⁵ However, the “aim behind the recommendation was soon met by other means.”¹⁸⁶ It is inferred that this recommendation was never acted upon given Roosevelt and King’s Hyde Park Declaration of 20 April 1941. The agreement facilitated US wartime economic assistance in the form of defence materiel to Canada. King “regarded Hyde Park as a triumph of personal diplomacy.”¹⁸⁷

The thirty-three wartime recommendations can be categorized into various categories:¹⁸⁸

- 1) Command and Control (C²), including training and movement of US personnel into Canada and facilities maintenance;¹⁸⁹
- 2) the defence of Newfoundland, including the installation and rehabilitation of roads, communications, railways, ports, and the underwater defence of the Argientia port in Newfoundland;¹⁹⁰
- 3) the defence of the river locks at Sault Ste. Marie as a strategic

¹⁸³ Ibid., 16; The addition of another Canadian Army representative was future Governor General of Canada Lt. Col Georges-Phillias Vanier.

¹⁸⁴ Ibid., 13, 16.

¹⁸⁵ PJBD Recommendation :12. Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 352.

¹⁸⁶ Conliffe, “The Permanent Joint Board on Defence: 50 years after FDR’s Kingston Declaration,” 58.

¹⁸⁷ The full text is provided in Dziuban’s *Military Relations Between the United States and Canada, 1939-1945* as Appendix D, 373.

¹⁸⁸ For a full description of the wartime recommendations, see: Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, Appendix A, 349-365; For a condensed version of the recommendations, see: Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 122-124; For wartime meeting dates, locations, and section membership, see: Keenleyside, “The Canada-United States Permanent Joint Board on Defence, 1940-1945,” 75-77.

¹⁸⁹ PJBD Recommendations: 21, 22, 31, and 32; Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 355-356, 361-364.

¹⁹⁰ PJBD Recommendations: 2, 3, 5, 8, 14, 15, 16, 17, 18, 20, 26, and 30; Ibid., 347-350, 352-355, 357, 358-361.

military asset and the transportation importance of the St. Mary's River. This would include the installation of a US Army anti-aircraft battery installation;¹⁹¹ 4) the defence of the Pacific and Alaska via the construction of the Alaska Highway for materiel and personnel movement, and air staging facilities for the defence of vulnerable locations in Alaska and British Columbia (some sites included: Vancouver Island, Edmonton, and Whitehorse);¹⁹² 5) Discussions regarding the post-War divestments of US assets in Canada began as early as Spring 1943;¹⁹³ and, 6) plans for coordinating the transfer of materiel into Canada to support the war effort with munitions, arms, planes, and destroyers.¹⁹⁴ The Board even ruminated on a plan to send German prisoners of war held by Britain to Newfoundland. The recommendation advised the Canadian government to dissuade Britain from doing so with the reason being it could jeopardize the Newfoundland defence plans. Eventually, these prisoners of war were sent elsewhere in Canada.¹⁹⁵ The recommendations were influenced greatly by the trajectory of the war. As a result, the defence of Newfoundland was of paramount importance to the Board, given its vulnerability to an invasion and its staging point for forces.

The Board also submitted three formal documents in addition to the thirty-three recommendations. The first, on 4 October 1940, was entitled "First Report of the Permanent Joint Board on Defense, Canada-United States." The four-page document outlined responsibilities of both nations with respect to Pacific and Atlantic coastal defences. The first two pages coordinate the construction of defence infrastructure on the East and West coast, such as staging facilities, highways, army bases, and runways. It also instructs Canada to "provide facilities in

¹⁹¹ PJBD Recommendations: 13 and 25; *Ibid.*, 352, 357.

¹⁹² PJBD Recommendations: 10, 11, 19, 24, and 29; *Ibid.*, 351-351, 354-355, 357, 359-361.

¹⁹³ PJBD Recommendations: 28 and 33; *Ibid.*, 358-359, 364-365.

¹⁹⁴ PJBD Recommendations: 4 and 27; *Ibid.*, 349, 358.

¹⁹⁵ PJBD Recommendation: 9; *Ibid.*, 351.

Newfoundland for the operation of [36 patrol planes and 73 “land” planes (assumed to be the P-51 Mustang)] United States aircraft.”¹⁹⁶ The next two pages outline C² arrangements for joint operations on the East and West coasts. This includes areas of responsibility and defence arrangements for strategic positions, such as Alaska, the Gulf of St. Lawrence, and Newfoundland.¹⁹⁷ The First Report was approved by both Roosevelt and the Canadian War Cabinet by 14 November 1940 — minus Canadian approval of a proposed highway between Prince Rupert and Terrace, B.C.¹⁹⁸ This practice of issuing reports was not followed in the future.¹⁹⁹

The second document was the first Basic Defence Plan, aptly named “Joint Canadian-United States Basic Defence Plan-1940,” or “Basic Plan No. 1.”²⁰⁰ Fulfilling PJBD Recommendation 7,²⁰¹ the plan of October 1940 was primarily concerned with the ramifications for North America should Britain and the North Atlantic fall to the Nazis and Pacific to the Japanese. The plan was defensive in design. It delegated responsibilities over *what* defences were required of each country.²⁰² This is also referred to as the “Black Plan,” as it referenced the complete Axis assault on North America.²⁰³

¹⁹⁶ “First Report of the Permanent Joint Board on Defense, Canada-United States.” See: Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 366-367.

¹⁹⁷ *Ibid.*, 368-369.

¹⁹⁸ *Ibid.*, 366. Approvals cited within the first footnote; Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 116.

¹⁹⁹ DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 9, 11.

²⁰⁰ *Ibid.*, 117; Basic Plan No.1 is not to be confused with “ABC-1,” which was a strategic plan between the United States and the Britain and did not involve Canada. See: Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 117; ABC-1 can be found in: *Pearl Harbor Attack: Hearings before the Joint Committee on the Investigation of the Pearl Harbor Attack* . . . (Washington. 1946), Part 15, Exhibit 62, page 1641.

²⁰¹ PJBD Recommendation 7; Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 350.

²⁰² Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 117-119.

²⁰³ Goette, *Sovereignty and Command*, 75; For a full explanation of the Black Plan, see Goette, *Sovereignty and Command in Canada-US Continental Air Defence 1940-57*, 75-78, 83, 194.

The following “Joint Operational Plan No. 1” was drafted by the Board’s service members to implement *how* the defences required in Basic Plan No. 1 would be installed.²⁰⁴ The operational plan was approved by the Canadian section of the Board. The plan included giving control of Canadian forces in Canada to the United States should an attack on the continent be imminent.²⁰⁵

At the same time, PJBD service members were also drafting the third document, the “Joint Canadian-United States Basic Defence Plan No. 2,” also known as “ABC-22.”²⁰⁶ By the spring of 1941, the Battle of Britain was over and the existential threat to England’s future had become less severe. ABC-22 would become operational upon the US entering the conflict and was far more offensive in nature than Basic Plan No.1, coordinating US and Allied involvement in Europe — acting in tandem with the US-British plan ABC-1.²⁰⁷ As the Royal Navy had survived, there was less of a direct concern that the Atlantic would become an avenue of Nazi attack on North America. Like Basic Plan No.1, US section members proposed that operational command of Canadian land and air forces in Canada fall under the U.S. Army Chief of Staff’s purview.²⁰⁸

This proposal received significant pushback from Ottawa and the Canadian Chiefs of Staff over the “strategic direction” of operational control of Canadian forces.²⁰⁹ The proposal would have integrated the US Northeast Defense Command with eastern Canada and Newfoundland, and US Northwest Defense Command with British Columbia.²¹⁰ King, showing “backbone,”²¹¹ and on

²⁰⁴ Ibid., 117; W.A.B. Douglas, “Democratic Spirit and Purpose: Problems in Canadian-American Relations, 1939-1945,” in *Fifty Years of Canada-United States Defense Cooperation: The Road From Ogdensburg*, edited by Joel Sokolsky and Joseph T. Jockel, (Lewiston, New York: The Edwin Mellen Press, 1992), 35.

²⁰⁵ Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 117-119.

²⁰⁶ Ibid., 117. ABC-22 can also be found in: *Pearl Harbor Attack*:

Hearings before the Joint Committee on the Investigation of the Pearl Harbor Attack . . . (Washington. 1946), Part 15, Exhibit 51, page 1585.

²⁰⁷ Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 117.

²⁰⁸ Ibid.

²⁰⁹ Ibid., 117-119.

²¹⁰ Granatstein, “Mackenzie King and Canada at Ogdensburg, August 1940,” 22.

²¹¹ Ibid.

the advice of his Chiefs of Staff, declined to approve ABC-22 because it would give the United States “supreme command over Canadian forces in Canada.”²¹² Biggar wrote to LaGuardia expressing the Canadian disdain over the suggestion: “Canada is all out in the war: the United States is not —yet. The time is therefore a very unpropitious one for it to be suggested that Canada should surrender to the United States what she has consistently asserted vis-à-vis Great Britain.”²¹³

By the end of May 1941, “strategic direction” had been replaced from ABC-22 in favour of “mutual cooperation” and coordination of each military.²¹⁴ The plan was agreed to by both governments. ABC-22 was placed into effect following the 6 December 1941 Japanese attack on Pearl Harbor and formal entry of the United States in the war. It was also operationalized for offensive plans against Germany and Italy.²¹⁵

The PJBD’s recommendations slowed as the war progressed and the number of meetings dwindled. Regular communication between Canadian and American Chiefs of Staff became more common as Washington became a belligerent in World War II and the respective defence departments took over more of the PJBD’s responsibilities.²¹⁶ PJBD meetings regularly rotated between Montreal and New York City, with occasional visits to specific defence locations, such as St. John’s, Newfoundland, or Alaska.²¹⁷ Montreal was preferred over Ottawa to limit interruptions that inevitably arise when important people are ‘just down the hall’ from the defence headquarters. New York City was preferred over Washington, likely out of deference to

²¹² Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 118.

²¹³ *Ibid.*, 118-119.

²¹⁴ DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 11; For a full description of ABC-22, see: Stetson Conn and Byron Fairchild, *The Framework of Hemisphere Defense*, (Washington, D.C.: Office of the Chief of Military History - Department of the Army, 1960), 382-389.

²¹⁵ Stacey, “The Canadian-American Permanent Joint Board on Defence, 1940-1945,” 119.

²¹⁶ *Ibid.*

²¹⁷ DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 7, 11.

LaGuardia's schedule.²¹⁸ Representative of the ebb and flow of the war, there were six meetings in the last five months of 1940, 8 meetings in 1941, 11 in 1942, 7 in 1943, five in 1944, and five in 1945.²¹⁹

²¹⁸ Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration," 56; For a full list of PJBD meeting locations from 1940-1963, see: Beatty, *The Canada-United States Permanent Joint Board on Defense*, 349-353.

²¹⁹ DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 7; Keenleyside, "The Canada-United States Permanent Joint Board on Defence, 1940-1945," 76-77.

Chapter 4: The PJBD during the Cold War (1946-1991)

4.1: The Agenda Thins (1946-1948)

The PJBD studied, advised, and made recommendations to address strategic vulnerabilities to North American defence. The Board played neither a role nor part in the Allied coordination of the D-Day landings in Normandy in June 1944 and had no say in the US decision to drop the atomic weapons on Japan. After the war's end in August 1945, the PJBD's role can be best described as:

[...] a particularly useful agency for the informal discussion of ideas before any formal approach [is] made, for negotiating defence matters in a setting where both military and diplomatic viewpoints [are] represented, for collecting and exchanging information, and for hastening executive action, smoothing out difficulties, eliminating delays, following up on decisions already taken and ensuring that important projects [are] not sidetracked in the press of departmental business.²²⁰

The minutes of the PJBD meetings were recorded and compiled by the Section secretaries into a Journal of Discussions and Decisions.²²¹ The journal entry for the PJBD's fortieth meeting in September 1945 strongly advocated for the continued utility of the Board, saying:

[...] the question of Canada-United States postwar military collaboration does not appear to present any special difficulty. Both [sections] were agreed that the founders of the Permanent Joint Board on Defense advisedly inserted the word Permanent in the Board's title. This being so, there would seem to be no reason why the two countries should not, and every reason why they should, continue their collaboration of the past five years in matters of defense.²²²

The number of meetings waned in the post-War era, with quarterly meetings held between 1945 and 1960.²²³ Rather than the thirty-three recommendations during the war, the PJBD

²²⁰ DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 11.

²²¹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 64; Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 347; The State Department and External Affairs Board Members served in both their representative capacity and as secretaries until 1951. After 1947, Journals were sent to the Privy Council Office (PCO) and National Security Council (NSC); Raised in discussions by Dr. Joseph T. Jockel at the "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023.

²²² Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 153.

²²³ *Ibid.*, 7.

managed only sixteen between the war's end and 1953. Then Canadian Lieutenant-Colonel Christopher Conliffe, who wrote extensively about the PJBD as a proxy of his military service and role as Queen's University Visiting Defence Fellow in 1987-1988,²²⁴ describes the period from 1945-1950 as "uncertainty."²²⁵ Three distinct factors, in addition to the war's end, drew focus away from the PJBD's role in joint defence planning for North America:

First, in December 1945, the PJBD advised on the creation of a Military Cooperation Committee (MCC), which continues to present day. It serves as a "combined planning team to prepare a basic security plan to defend Canada and the United States."²²⁶ This technical committee of military experts deals with military issues, rather than broad scope issues the PJBD is able to advise on, and is usually at the tactical and operational level. Typical MCC topics include force generation, force employment, and force development.²²⁷ The MCC also serves as the principal strategic connection between the Canadian and US Joint Military Staffs, with meetings rotating between Ottawa and Washington, D.C.²²⁸ Defence plans are created in the MCC and reported to the PJBD. These plans are then sent to the Canadian Chief of the Defence Staff (CDS) and the American Chairman of the Joint Chiefs of Staff (CJCS) for authorization. Once authorized, the plans are given to the government for formal approval. In 1946, this was the US Secretary of Defense and Canadian Defence Committee for Canada.²²⁹ The MCC was also responsible for

²²⁴ "Former Visiting Defence Fellows," *Queen's University Centre for International and Defence Policy*.

²²⁵ Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 152-156.

²²⁶ Mace MacElhane, "Information Paper on the Canada-United States Military Cooperation Committee (MCC)," unclassified USNORTHCOM briefing courtesy of Dr. Ben Gochman, 15 December 2014.

²²⁷ Ibid.

²²⁸ Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 5.

²²⁹ Goette, *Sovereignty and Command*, 113; The MCC's membership includes: Canadian and American co-Chairs, that are typically General/Flag Officers appointed by the CJCS and CDS; DoD Secretary of Defense for Policy (OSD(P)) and DND Assistant Deputy Minister for Policy (ADMPol); US Joint Staff and Canadian Strategic Joint Staff; NORAD; US Northern Command; US Southern Command; Global Affairs Canada and US State Department; and, defence attachés from each capital; See: Mace MacElhane, "Information Paper on the Canada-United States Military Cooperation Committee (MCC)," unclassified USNORTHCOM briefing courtesy of Dr. Ben Gochman, 15 December 2014.

designing the Basic Security Plan (BSP) of 1946, which outlined “a comprehensive continental air defence organization, cartography, air and surface surveillance to provide early warning of attack, anti-submarine and coastal defence, counter-lodgements plans, and a joint command structure.”²³⁰ As the world became more technologically advanced and complex, the MCC’s agenda grew while fewer issues were suitable for discussion at the PJBD.

Second, the 1947 U.S. National Security Act created a slew of new civilian security agencies vested within the President’s authority, completely restructuring the US military during post-war demobilization.²³¹ The creation of the Joint Chiefs of Staff (JCS) and Chairman of the Joint Chiefs of Staff (CJCS) coordinated military policy from all forces into a US government-wide doctrine.²³² This exposed the need for more intelligence and planning assistance. The National Security Council (NSC), created in 1947, serves as “the [US] President’s principal forum for national security and foreign policy decision making.”²³³ The NSC may be most responsible for the PJBD’s reduced role, as the co-Chair position was no longer worthy of such direct presidential access in favour of the NSC.

Third, the PJBD co-Chairships no longer remained constant as they did throughout the war.²³⁴ The continuity created collegiality and familiarity among the membership and offered

²³⁰ Philippe Lagassé, “Northern Command and the Evolution of Canada-US Defence Relations,” *Canadian Military Journal* (Spring 2003), 17, <http://www.journal.forces.gc.ca/vo4/no1/doc/v4n1-p15-22-eng.pdf>.

²³¹ Charron, “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 5.

²³² “The National Security Act of 1947;” Under Title I, the Act created civilian security institutions such as the Central Intelligence Agency, the National Security Council, the now-defunct National Security Resources Board. Under Title II, the National Military Establishment and the Secretary of Defense were created to oversee the Army, Navy, Air Force; a Munitions Board and War Council were also created. Additionally, Truman agreed to the implementation of the US Unified Command Plan (UCP) in 1946, which split the world into geostrategic Combatant Commands (CoCOMs): Far East, Pacific, Alaska, Atlantic, Caribbean, European, and Northeast. See: Goette, *Sovereignty and Command in Canada-US Continental Air Defence 1940-57*, 54-55.

²³³ Government of the United States, “The National Security Council,” *The White House of President Joe Biden*, last accessed 20 April 2023, <https://www.whitehouse.gov/nsc/>.

²³⁴ For a full list of Section membership between 1940-1963, see: Beatty, *The Canada-United States Permanent Joint Board on Defense*, 342-345 (Appendix B); or, Appendix D of this thesis.

reliability in its advice recommendations. After the war, due to a number of deaths, the membership of key positions changed. Roosevelt died in 1945. LaGuardia – the first US Chair – died in 1947. Biggar – the first Canadian Chair – retired due to health concerns in 1945, and King retired in 1948. Neither LaGuardia nor King enjoyed ready access and as close of a relationship to Roosevelt’s successor Truman as they did with Roosevelt.²³⁵ King appointed General A.G.L. McNaughton as the second Canadian co-Chair in 1945, who served until 1959. McNaughton, like Biggar, also enjoyed close and ready access to King and likely Prime Minister Louis St. Laurent, as he and King were both from the Liberal Party.²³⁶ Truman appointed future Secretary of State Dean Acheson, who served for just one year. His successor was Major-General Guy V. Henry, who served as US co-Chair until 1954.²³⁷ The original wartime membership and drafters of the Ogdensburg Agreement were no longer part of the PJBD, creating some uncertainty of its continuity and access to the Prime Minister and the President — a critical factor for the co-Chairs of the PJBD to expedite pressing defence and security issues for immediate attention.

Preemptively advocating for the PJBD’s future role as an advisory body, US Section Army member Major-General Guy V. Henry drafted PJBD Recommendations 34 and 35 that “outlined a series of principles of defense cooperation.”²³⁸ Recommendations 34 and 35 both advocated for the PJBD’s continuity in-perpetuity. They were submitted in April 1946, but 35 was dismissed by

²³⁵ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 154-155.

²³⁶ Biggar was advised by his doctor to resign from the PJBD due to health issues. In his obituary, *The Globe and Mail* described his and LaGuardia’s “contribution to understanding and to [WW2] victory was a large one.” See: “Military Figure, In 2 World Wars, Toronto Native,” *The Globe and Mail*, 6 September 1948, <https://uml.idm.oclc.org/login?url=https://www.proquest.com/historical-newspapers/military-figure-2-world-wars-toronto-native/docview/1291652245/se-2>; For a chronography of PJBD co-Chairs, see Appendix A; For more on McNaughton’s appointment, see: Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 154-155; For a timeline of PJBD board membership, see: DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 15-16.

²³⁷ DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 15; Major-General Guy V. Henry was the US Army member from December 1942 until November 1947. He was then appointed co-Chair from December 1948 until April 1954. See: DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 15.

²³⁸ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 153.

Canada. It is not explained in the literature why 35 was dismissed, but it can be inferred that the word “cooperation” caused concern as differences between the terms “military cooperation” and “joint defence activity” were Canadian considerations in how the relationship with the US would be viewed in the post-War period.²³⁹ Henry’s pre-emption also created dismay amongst the US Section, as it was viewed he had overstepped the role of the new JCS and represented neither its command nor authority with these recommendations.²⁴⁰ PJBD Recommendation 36, which was a revised version of Recommendation 35, was submitted and approved by both governments on 20 November 1946.²⁴¹ On 12 February 1947, the governments of Canada and the United States issued the “Joint Statement on Defense Collaboration.”²⁴² Its purpose was to outline to the general public and other states that Canada-US defence cooperation would continue in peacetime, indefinitely. The MCC, however, had now taken over the strategic planning functions the PJBD held during the war.²⁴³

The Board now discussed issues that, while still incrementally important for the security of North America, were initially of less urgency and military significance than those required during the war. In its May 1947 meeting, the PJBD discussed the construction of the St. Lawrence Seaway, a critical shipping and transportation link from the Great Lakes to the Atlantic, and the standardization of screw thread sizes.²⁴⁴ Beginning in 1947, PJBD recommendations now included

²³⁹ PJBD Recommendations 34 and 35. Conliffe, “The Permanent Joint Board on Defence: 50 years after FDR’s Kingston Declaration, 59.

²⁴⁰ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 153-155; DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 8.

²⁴¹ PJBD Recommendation 36. Conliffe, “The Permanent Joint Board on Defence: 50 years after FDR’s Kingston Declaration, 59.

²⁴² Government of Canada, *Joint Statement by the Governments of Canada and of the United States of America Regarding Defence Co-Operation Between the Two Countries E100977 - CTS 1947 No. 43*, 12 February 1947, <https://www.treaty-accord.gc.ca/text-texte.aspx?id=100977>; The statement is also reprinted in: Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, 374-375.

²⁴³ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 154.

²⁴⁴ Ibid.

the year and number, rather than just a chronological number like the wartime thirty-three and Henry's additional three were so styled. The only recommendation the PJBD made in 1947 concerned the reciprocal transportation of military personnel onboard military aircraft belonging to either Canada or the United States.²⁴⁵

Recommendations were equally few in number until 1950, although meetings were held five times in 1946, four times in 1947, and four times in 1948.²⁴⁶ The PJBD made two recommendations in 1948. The first recommended reducing delays to expedite the construction of the St. Lawrence Seaway and power project.²⁴⁷ The second recommended that Canada purchase military materiel such as arms, equipment, weapons, and other supplies from the United States.²⁴⁸ That year, the discussion of the standardization of screw thread sizes between Canada and the United States was also considered again.²⁴⁹ The only recommendation in 1949 outlined that economic trade of military equipment between the two states as beneficial to continental security - the implementation of a reciprocal purchasing program between militaries happened the next year.²⁵⁰ Given Newfoundland's independence from Britain and entry into Canadian Confederation as a province in 1949, 1950 also saw one recommendation concerning the administrative functions (taxes, customs, duties, offices, and jurisdiction) for US personnel stationed in Newfoundland. Canadian legislation was changed to reflect the PJBD's advice.²⁵¹

²⁴⁵ PJBD Recommendation 47/1. Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration, 59.

²⁴⁶ Beatty, *The Canada-United States Permanent Joint Board on Defense*, Appendix D.

²⁴⁷ PJBD Recommendation 48/1. Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration, 59; See: Beatty, *The Canada-United States Permanent Joint Board on Defense*, 231.

²⁴⁸ PJBD Recommendation 48/2. Ibid.

²⁴⁹ The topic of standardization of screw threads is attributed to McNaughton's academic background in science at McGill University. See: Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 154.

²⁵⁰ PJBD Recommendation 49/1. Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 154; Beatty, *The Canada-United States Permanent Joint Board on Defense*, 189, 196. The US Congress passed the "Mutual Defense Assistance Act," which included a Buy American clause, on 6 October 1949; Beatty, *The Canada-United States Permanent Joint Board on Defense*, 189, 196. Beatty also makes the correlation between 49/1 and the Defense Production Sharing Agreement (DPSA) signed in 1956.

²⁵¹ PJBD Recommendation 50/1. Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 154.

4.2: A New Urgency for Continental Defence (1949-1953)

The geopolitical environment shifted in 1949 and 1950, with three events bringing the defence and security of North America back to the forefront of priorities for both capitals.²⁵² First, the Soviet Union now possessed nuclear capabilities and a the Soviet long-range strategic bomber fleet capable of flying over the Canadian Arctic to reach US and Canadian targets.²⁵³ Second, the Communist regime took control of mainland China, with the US-aligned Nationalists and Chiang Kai-shek fleeing to the island of Taiwan.²⁵⁴ Third, the Korean War between the Soviet-backed Communist North and the American-backed Capitalist South began in June 1950.²⁵⁵ In response to the changing global situation, the PJBD now required appointments of full-time representatives from External Affairs and the State Department, in addition to a Section secretary who was appointed relative to their position in government. Additional public servants in non-military positions were necessary as the Board's deliberations expanded to include diplomatic, border, and economic issues.²⁵⁶ However, the number of PJBD meetings remained constant, with three in 1949, four in 1950, five in 1951, three in 1952, and four in 1954.²⁵⁷

1951 was a year of renewed activity for the PJBD and the Board was now in its "second golden age."²⁵⁸ Given the geopolitical environment and new threats to North America, five of the six recommendations in 1951 concerned continental air defence. This was due to the emergence of increasing threats to the North American air domain because of Soviet long-range bombers as

²⁵² Beatty, *The Canada-United States Permanent Joint Board on Defense*, 64.

²⁵³ On 29 August 1949, the Soviet Union successfully detonated the RDS-1 ("First Lighting") nuclear weapon in Kazakhstan.

²⁵⁴ After the loss of strategic territory and capitals as a result of the Chinese Civil War, the Nationalist government fled to Taiwan. The Chinese Communist Party and People's Liberation Army have governed mainland China since.

²⁵⁵ The United States and Soviet Union both directly intervened in the Korean War. This drew the nuclear-capable great powers into proxy conflict with one another.

²⁵⁶ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 64; DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 16.

²⁵⁷ Beatty, *The Canada-United States Permanent Joint Board on Defense*, Appendix D.

²⁵⁸ Jockel, *No Boundaries Upstairs*, 124.

the threat focus. The 1951 recommendations followed the October 1950 meeting that recognized the threat that Soviet aircrafts posed. Confronted with this mutual problem, Ottawa and Washington “charged the PJBD with the task of studying and recommending policies regarding the nature and scope of Canadian-American defence for the post war period.”²⁵⁹

The first recommendation of 1951 was placed on the agenda at the behest of the US JCS to study and advise on the extension of the continental Air Defense System.²⁶⁰ On 1 February 1951, the PJBD produced a document entitled The Pinetree System. The document recommended the northward extension of both Canadian and American radar warning systems into an amalgamated, bilateral air defence system. The goal was to reduce radar coverage gaps and integrate air warning and interception for Canada and the United States.²⁶¹ Historian Beatty makes the correlation between this recommendation and the joint plans that Washington and Ottawa announced in 1954 for the construction of the Mid-Canada Line (also known as the McGill Fence) as the Pinetree’s “extension.” Discussions over the Distant Early Warning (DEW) Line that would augment both followed in 1954.²⁶² This recommendation also proposed the joint “operational control” of the new radar systems fall under the command of the U.S. Air Force (USAF) Air Defense Commander (ADC), located in Colorado Springs, Colorado with no Canadian ADC involvement.²⁶³ Recommendation 51/1 was approved by the Canadian Cabinet on 20 February 1951 and President Truman on 14 April 1951.²⁶⁴

²⁵⁹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 109.

²⁶⁰ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 156.

²⁶¹ PJBD Recommendation 51/1. Conliffe, “The Permanent Joint Board on Defence: 50 years after FDR’s Kingston Declaration, 59; For an explanation of 51/1, see: Goette, *Sovereignty and Command*, 142-143; Jockel, *No Boundaries Upstairs*, 44-46; Please note that Beatty states the 74th Meeting of the PJBD was held in Colorado Springs in January 1954, not February 1951. See: Beatty, *The Canada-United States Permanent Joint Board on Defense*, 351.

²⁶² Beatty, *The Canada-United States Permanent Joint Board on Defense*, 249, 252.

²⁶³ Goette, *Sovereignty and Command*, 142-143; There were both Canadian and American Air Defense Commanders.

²⁶⁴ *Ibid.*, 250. Endnote 47; Goette argues that the interpretation of “overall operational control” is not the precursor to NORAD, but is about the functioning of the proposed radar lines. However, the RCAF recognized that an integrated air defence picture under a singular joint command was preferable, but 1951 was too early to implement such a

Recommendation 51/2 reiterated the support for the development of the St. Lawrence Seaway²⁶⁵ and Recommendation 51/3 discussed combined air defence training exercises.²⁶⁶ Discussed at the 9 May 1951 meeting, Recommendation 51/4 proposed that military aircraft from either country have jurisdiction to intercept unidentified aircraft regardless of which national airspace they were in.²⁶⁷ After the outbreak of the Korean War, Truman authorized the USAF to destroy hostile aircraft in US sovereign airspace. Due to limited capabilities, the RCAF had a coverage gap over Newfoundland and the Prairies, but the USAF requested Canadian approval and jurisdiction to intercept enemy aircraft. To assuage perpetual concerns regarding United States' access to sovereign Canadian territory and airspace, Recommendation 51/4 placed restrictions that USAF interceptors could only engage unidentified aircraft in Canadian airspace during peacetime and if the aircraft was headed towards the United States, where it would then be the US ADC's decision to shoot down. The Canadian Cabinet quickly accepted the recommendation on 30 May 1951.²⁶⁸ In the August 1951 PJBD meeting, the USAF member of the PJBD accepted the recommendation as an "interim measure."²⁶⁹ President Truman accepted the recommendation in October 1951.²⁷⁰

command. See: Goette, *Sovereignty and Command*, 142-143; For a comprehensive account of the negotiations over the Pinetree Line, see: Jockel, *No Boundaries Upstairs*, 42-52.

²⁶⁵ PJBD Recommendation 51/2. Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration, 59; Truman urged Congress in January 1952 to pass legislation approving the 1941 St. Lawrence Seaway and Power Project. See: Beatty, *The Canada-United States Permanent Joint Board on Defense*, 231; The International Joint Commission began to advise on the St. Lawrence River Hydro-Power Project and approved construction, beginning in 1952. See: IJC Reference 67, *International Joint Commission*, 1 January 1952, <https://ijc.org/en/67r>; IJC Application for Order of Approval Docket 68, *International Joint Commission*, 1 January 1952, <https://ijc.org/en/68a>; The reference (67R) acts as advice to be approved by subsequent orders (68A); "The St. Lawrence Seaway: A Vital Waterway," *Great Lakes-St. Lawrence Seaway System*, accessed 6 May 2023, <https://greatlakes-seaway.com/en/the-seaway/>. Thanks to Jay Dion for his assistance with this footnote.

²⁶⁶ PJBD Recommendation 51/3. Ibid.

²⁶⁷ PJBD Recommendation 51/4. Goette, *Sovereignty and Command*, 147, 202.

²⁶⁸ Ibid., 147.; It is noteworthy that Conliffe states that the Canadian government did not approve 51/4, while Goette states that the Canadians quickly agreed on 30 May 1951 and, at the objection of the USAF, Truman hesitantly approved the recommendation in October 1951. Jockel reiterates Goette's viewpoint; See: Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration, 59; Jockel, *No Boundaries Upstairs*, 52.

²⁶⁹ Jockel, *No Boundaries Upstairs*, 52.

²⁷⁰ Goette, *Sovereignty and Command*, 147.

The 11-12 November 1951 meeting resulted in the two final recommendations of 1951: Recommendation 51/5 concerned the regulations for cross-border movement of military aircraft,²⁷¹ and, Recommendation 51/6 advised that when both Canadian and American ADC's agree, then both should have the authority to redeploy the others' forces regardless of whether the aircraft is flying in Canadian or American airspace in a wartime situation.²⁷² This recommendation was placed on the PJBD's agenda at the behest of the RCAF Air Marshal Wilfred Curtis. He proposed that both Canadian and American ADC's should have the ability to redeploy both US and Canadian forces in September 1951.²⁷³ The Canadian Cabinet approved 51/6 immediately on 12 November 1951 and Truman approved the recommendation in March 1952.²⁷⁴

The PJBD issued two recommendations in 1952: Recommendation 52/1 was the maritime-domain equivalent of the air-domain recommendation 51/5. It advised that informal and operational transit of territorial waters and to ports be approved on a service-to-service level. Formal visits would be arranged via the State Department and External Affairs.²⁷⁵ Second, Recommendation 52/2 advised on regulations for private maritime operators and the use of electro-magnetic aids to navigation, as their exploitation was feared as an enemy tactic.²⁷⁶

The PJBD issued only one recommendation in 1953. Proposed in October, Recommendation 53/1 superseded the "interim measure" of 51/4²⁷⁷ and advised that:

[A]ircraft controlled by the Air Defence System of the United States, or of Canada, engaged in intercepting unidentified aircraft during peacetime, shall be permitted to fly

²⁷¹ PJBD Recommendation 51/5. Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 157; Conliffe states this meeting took place between 11-21 November 1951, whereas Goette states that this meeting took place on 11-12 November 1951. See: Goette, *Sovereignty and Command*, 146.

²⁷² PJBD Recommendation 51/6. Goette, *Sovereignty and Command*, 201; For a comprehensive explanation of 51/6, see: Jockel, *No Boundaries Upstairs*, 53-55 and Goette, *Sovereignty and Command*, 146-147.

²⁷³ Goette, *Sovereignty and Command*, 146.

²⁷⁴ Goette, *Sovereignty and Command*, 147.

²⁷⁵ PJBD Recommendation 52/1. Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration, 59; Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 157.

²⁷⁶ PJBD Recommendation 52/2. Ibid.

²⁷⁷ Jockel, *No Boundaries Upstairs*, 52; Goette, *Sovereignty and Command*, 147.

over the territory of either country as may be required to carry out effective interception” under the military rules of engagement and civilian regulations regardless of the origin of the interceptor aircraft.²⁷⁸

53/1 eliminated restrictions found in 51/4. These included the identification of peacetime versus wartime relative to the geopolitical environment, hostile intent of the unidentified aircraft, and the requirement that the unidentified aircraft in question had to be flying towards the border while in Canadian airspace for US air defence forces to intercept.²⁷⁹

With the benefit of hindsight, 53/1 is of paramount importance for the CANUS defence relationship writ large and is perhaps the PJBD’s most consequential recommendation ever made. The recommendation supports the binational view of an indivisible North American airspace with Canadians and Americans with the solution ultimately arriving at a binational C² institution jointly responsible for continental defence. As both scholars Jockel and Goette comprehensively explain, the increasing integration of both states’ Air Defence Systems eventually resulted in the operationalization of the binational North American Air (later Aerospace) Defense Command in September 1957 — responsible for airspace (later aerospace in 1981) warning, airspace (later aerospace in 1981) control (and later, maritime warning in 2006) of Canada and the continental United States.²⁸⁰

²⁷⁸ PJBD Recommendation 53/1. Goette, *Sovereignty and Command*, 209; For a full explanation of 53/1, see: Jockel, *No Boundaries Upstairs*, 56-58; Goette, *Sovereignty and Command*, 148-150; For the full Recommendation, see Appendix B.

²⁷⁹ Jockel, *No Boundaries Upstairs*, 56.

²⁸⁰ North American Aerospace Defense Command Office of History, *A Brief History of NORAD as of 31 December 2013*, (Colorado Springs Co: NORAD Headquarters: 31 December 2013), [https://www.norad.mil/Portals/29/Documents/A%20Brief%20History%20of%20NORAD%20\(current%20as%20of%20March%202014\).pdf](https://www.norad.mil/Portals/29/Documents/A%20Brief%20History%20of%20NORAD%20(current%20as%20of%20March%202014).pdf); For an explanation of the preceding events leading to NORAD’s operationalization, see: Jockel, *No Boundaries Upstairs*; Goette, *Sovereignty and Command*; For NORAD’s history since 1957, see: Joseph T. Jockel, *Canada in NORAD, 1957-2007*, (Montreal and Kingston: McGill-Queen’s University Press, 2007); Andrea Charron and James Fergusson, *NORAD: In Perpetuity and Beyond*, (Montreal and Kingston: McGill-Queen’s University Press, 2022).

The PJBD recommendations between 1946 and 1953 were fewer compared to the wartime years. However, the sixteen recommendations made were still of great importance to the expanding and ongoing institutionalization of the CANUS relationship and the PJBD was held in high regard by both the Canadian and American defence departments.²⁸¹ After the practice of issuing formal recommendations ended, the Board still discussed and studied a plethora of other joint military issues: tactical air navigation radar (TACAN) and long-range navigation radar (LORAN) systems; weather stations; Arctic air strips; use of weather stations; tax exemptions for US forces at radar installations; the strategic use of Churchill, Manitoba; construction of air bases running alongside the Alaska Highway; the Haines-Fairbanks Road and Pipeline; and, submarine sounding stations off the coasts of Nova Scotia, Newfoundland, and British Columbia.²⁸² The Board's utilitarian role can be best summed up by historian Beatty as:

[advice on issues] between Canada and the United States in standardization of equipment and operational procedures, further conduct of joint military exercises, establishment of more joint defense installations, as well as industrial planning and procurement.²⁸³

4.3: “Appreciable” Activity²⁸⁴ (1954-1958)

After 53/1, the PJBD's importance to decision-making was relegated in favour of new and emerging defence and security links, like the MCC and NORAD. Even if the Board's rejuvenation was consequential, it was short-lived. As the two states further institutionalized and coordinated air defences with NORAD's operationalization in September 1957 and formal diplomatic signing in May 1958, the PJBD was largely left on the sidelines. The USAF and RCAF were coordinating technicalities regarding C² arrangements on a service-to-service basis.²⁸⁵ Additionally, the Canada-

²⁸¹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 201.

²⁸² *Ibid.*, 95-96.

²⁸³ *Ibid.*, 201.

²⁸⁴ *Ibid.*, 280.

²⁸⁵ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 159; Jockel, *No Boundaries Upstairs*, 79.

U.S. Military Study Group (MSG) was formed in 1953 as a joint, ad hoc committee tasked with coordinating information regarding radar installations between the air forces.²⁸⁶ The MSG also formed the subordinate Canada-United States Scientific Advisory Team, which studied and evaluated joint early warning radar systems.²⁸⁷ The PJBD had faded into the background.

Further changes to the Board's composition were made upon President Eisenhower's inauguration in 1953. Major General Henry was replaced as US co-Chair with Dr. John A. Hannah - the president of Michigan State University. Governor Thomas Dewey (the 1948 Republican candidate for president) declined Eisenhower's appointment to the Board. Dewey served as the Republican nominee for President in 1944 and 1948, Governor of New York from 1943 to 1954, and was a key ally in securing Eisenhower's Republican nomination for President in 1952. That Eisenhower even viewed Dewey as appropriate for the Board's work signaled the importance the new administration placed on the PJBD's legacy, utility, and vital role Canada had to play in continental defence. Hannah also enjoyed quarterly meetings with Eisenhower, mirroring that close connection that LaGuardia had with Roosevelt, which allowed the co-Chairs to expedite pressing defence and security issues to the executive for action.²⁸⁸ Reciprocating the renewed US interest, Canada sent an official from the Department of Defence Production to sit as an observer in 1954.²⁸⁹ General McNaughton remained Canadian co-Chair until 1959.²⁹⁰ During this period, the Board met four times a year except for in 1957 when it met only three times.²⁹¹

Eisenhower's Secretary of Defense Wilson changed the US PJBD section's operating chain of command in March 1954. Instead of the JCS, the Board members would now report directly to

²⁸⁶ The 1946 BSP outlined the MSG service-to-service coordination; Lagassé, "Northern Command and the Evolution of Canada-US Defence Relations," 17.

²⁸⁷ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 248.

²⁸⁸ *Ibid.*, 100.

²⁸⁹ *Ibid.*, 158.

²⁹⁰ DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 15.

²⁹¹ See Appendix C.

the Office of the Secretary of Defense. Wilson went ahead with the changes against the objections of the Chiefs. His goal was to better implement the US PJBD members in the US defence “decision-making process.”²⁹² The Chiefs also dismissed the idea of a US Joint Staff in Ottawa, like the Canadian Joint Staff in Washington. Wilson did not implement this idea. Jockel states that the impetus behind Wilson’s thinking was to establish a closer CANUS defence relationship, but that was already occurring between the RCAF and USAF.²⁹³

Conliffe hypothesized that Canadian development of the Avro Arrow was discussed at PJBD meetings during the mid-1950s, although there is no official record of this.²⁹⁴ Beyond 53/1, the Board had no further involvement with NORAD’s September 1957 operationalization which was instead largely driven by the Eisenhower government’s directives to the USAF in their service-to-service negotiations with the RCAF.²⁹⁵ The MSG provided the PJBD studies on continental air defence between 1953 and 1957. At the PJBD’s 86th meeting in January 1957, the MSG told the Board that the ad-hoc committee had sent both the Canadian and US military chiefs a report on the proposed integrated operational control of North American air defence. It highlighted the need for both Chiefs to secure political approval from Washington and Ottawa for the NORAD agreement.²⁹⁶ The MSG, not the PJBD, was helping the services to drive the NORAD agreement forward politically.

The PJBD also issued no formal recommendations regarding the construction of the Distant Early Warning (DEW) Line, besides a weak correlation with Recommendation 51/1 calling for the Permanent Radar Net and “The Pinetree System” document.²⁹⁷ Instead, the MSG proposed in June

²⁹² Jockel, *No Boundaries Upstairs*, 79.

²⁹³ *Ibid.*, 78-79.

²⁹⁴ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 158.

²⁹⁵ *Ibid.*, 159.

²⁹⁶ *Ibid.*

²⁹⁷ PJBD Recommendation 51/1. Conliffe, “The Permanent Joint Board on Defence: 50 years after FDR’s Kingston Declaration, 59.

1954 that Canada and the United States “agree in principle upon the necessity for the DEW Line, and that further action to determine the military characteristics and constructions plans for the line commence.”²⁹⁸

The Board also suggested, via an unknown method, that the construction of the DEW Line remain the responsibility of the United States, and that Canada would participate in the operations and maintenance side.²⁹⁹ An explanation as to why the PJBD did not issue a formal recommendation with regards to the DEW Line remains elusive, although the creation of the MSG and its mandate to study and advise on North American air defence is likely the reason. It is unclear why the MSG was needed or originally created and there is little academic literature on this institution.³⁰⁰

The major shift in PJBD activity during the mid-1950s saw the Board transition from making recommendations to consulting on renewal processes of specific agreements between Canada and the United States. Historian Beatty states that the PJBD “afforded a ready agency to study and recommend solutions,” at the request of both capitals.³⁰¹ A key function of this role kept the PJBD’s original ability to have frank discussions away from the media spotlight, without leaks and where Section members could speak openly with candor. As issuing recommendations was no longer a function of the Board, off-the-record discussions on sensitive issues that would not feature in minutes of the meeting became common. A US chairman at the 150th meeting of the PJBD in 1978 re-emphasized the consulting function, saying:

²⁹⁸ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 252.

²⁹⁹ Ibid., 253-254; See: Government of Canada, *Exchange of Notes Between Canada and the United States of America Governing the Establishment of a Distant Early Warning System in Canadian Territory E101010*, CTS 1955 No. 8, <https://www.treaty-accord.gc.ca/text-texte.aspx?id=101010>; For more documents on the DEW Line, see: P. Whitney Lackenbauer and Matthew Farish, “The Distant Early Warning (DEW) Line Coordinating Committee: Minutes and Progress Reports, 1955-63,” *Documents on Canadian Arctic Sovereignty and Security*, 2019, <https://arts.ucalgary.ca/sites/default/files/teams/25/DEW%20Minutes%20-%20DCASS%20v15.pdf>.

³⁰⁰ Lagassé, “Northern Command and the Evolution of Canada-US Defence Relations,” 17.

³⁰¹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 252.

A good deal of off-the-record discussion among members was instrumental in the resolution or, at least, the clarification of a number of crucial matters. The opportunity to conduct informal bilateral discussions among the members, all of whom are involved from day to day in North American defense policy planning, has become one of the great strengths of the Board.³⁰²

Many defence agreements fell into this new consultative phase of the Board: The United States-Canada Haines-Fairbanks Pipeline agreement was negotiated in the PJBD beginning in 1952 and was constructed by 1955.³⁰³ It provided Alaska and Yukon-based troops with oil and petrol products that would later transition to civilian control after twenty years.³⁰⁴ Both federal governments agreed that after that time, the PJBD would study, deliberate, and advise on the pipeline's continued need relative to military requirements.³⁰⁵ The Board discussed and negotiated the winter maintenance of the pipeline in January 1957, as it required cross-boundary troop movements. The Board continued to discuss the renewal of the agreement concerning the pipeline's maintenance in 1959, 1962, 1963, and 1966. The PJBD advised in 1966 that the governments of Alaska and British Columbia assume responsibility for these discussions.³⁰⁶

In September 1953, the PJBD was tasked with acting as a dispute mechanism over the agreement concerning the operational transfer of long-range navigation radar (LORAN) stations in Newfoundland from the US Coast Guard to Transport Canada. The PJBD was also tasked with the eventual study of considerations and recommendations for the US Coast Guard operation of a LORAN station on Baffin Island in 1954.³⁰⁷ Additionally, in September 1955, the USAF built an oil pipeline between the USAF dock in St. John's and Pepperrell Air Force Base in Newfoundland. This was to avoid the hauling of oil tankers through the city of St. John's. The PJBD advised that

³⁰² Lackenbauer, "Permanency, Reassurance, and Quiet Diplomacy." 4.

³⁰³ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 263.

³⁰⁴ *Ibid.*, 261-262.

³⁰⁵ *Ibid.*, 262.

³⁰⁶ *Ibid.*, 264.

³⁰⁷ *Ibid.*, 265-266.

instead of a twenty-year operating agreement for the USAF, each government could opt out if they provided one year notice. Should one party opt out, the Board would then advise on the continued utility of the pipeline.³⁰⁸ In April 1956, the PJBD also advised that US troops in Canada be covered and contribute to Canadian unemployment insurance.³⁰⁹

After the NORAD agreement was signed in May 1958, the PJBD facilitated discussion and advice on the “establishment, maintenance, and operation by the United States government of aerial refueling facilities in Canadian territory.”³¹⁰ The Leased Bases agreement, signed by the United States and United Kingdom in 1941 and updated after PJBD Recommendation 50/1, gave the United States the ability to refuel at Goose Bay and Harmon Air Field in Newfoundland.³¹¹ After members of the US PJBD Section asked the Canadian Section for further use of Canadian airspace for aerial refueling, Ottawa gave US Strategic Air Command (SAC) permission to fly in Canadian airspace as long as it was precleared with Canadian officials.³¹² There is no record of this PJBD-facilitated agreement concerning SAC preclearance in a formal recommendation, highlighting the importance of the PJBD meeting minutes and Journals in providing advice to senior decision-makers.

Historian Beatty describes the Board’s role in the mid-1950s beyond formal recommendations as: “a clearing house in case of disagreement between [the two] nations over the exigencies of a particular defense project.”³¹³ He further explains the PJBD as:

The Board functioned as an agency where final consideration and recommendation might be rendered before a government discontinued a joint defensive project. In many Canadian-

³⁰⁸ Ibid., 267.

³⁰⁹ Ibid., 267-268.

³¹⁰ Ibid., 277.

³¹¹ Ibid., 277; Government of Canada, *Exchange of Notes Between Canada and the United States of America Confirming the Recommendation of March 28-30, 1950, Made by the Permanent Joint Board on Defence Concerning Leased Bases in Newfoundland E100978*, CTS 1952 No. 14, 13 February 1952, <https://www.treaty-accord.gc.ca/text-texte.aspx?id=100978>.

³¹² Beatty, *The Canada-United States Permanent Joint Board on Defense*, 277.

³¹³ Ibid., 265.

American defense agreements the Board played a significant role, not only in formulating the terms of the understanding but also in furnishing a kind of final board of review to consider at some time in the future the continuing necessity of a particular defense project.

4.4: Canada-US Relations at their Nadir (1959-1963)

Prime Minister John Diefenbaker's election in 1958 ended 23 years of Liberal rule in Canada. Canadian PJBD co-Chair Gen. McNaughton, who enjoyed a close relationship with both King and St. Laurent, resigned in 1959 to serve on the International Joint Commission – another binational board that monitors the health of joint CANUS waterways.³¹⁴ His replacement was Dana L. Wilgress, a longtime diplomat and the first Canadian PJBD co-Chair to be appointed by the then Department of External Affairs (now Global Affairs Canada).³¹⁵ In this period, the Board met three times a year.³¹⁶

It appears Wilgress and Diefenbaker did not have as close of a relationship as past PJBD co-Chairs and executives -- a key tenant of the PJBD's ability to cut across bureaucratic obstacles to the executive for expediency on pressing defence and security issues.³¹⁷ Similarly, upon John F. Kennedy's election in 1960, US PJBD co-Chair Hannah and the new President did not enjoy the collegial relationship that Hannah and Eisenhower did. Hannah resigned from the PJBD in September 1963.³¹⁸ Additionally, Diefenbaker and Kennedy's strained relationship has been well documented, especially during the Cuban Missile Crisis.

The nuclear age brought great tension and disagreement to the CANUS relationship. The development of the CIM-10 BOMARC (Boeing Michigan Aeronautical Research Center) surface-to-air (SAM) missile and deployment of the Semi-Automatic Ground Environment (SAGE) to

³¹⁴ Ibid., 290; See: Appendix A.

³¹⁵ Ibid., 291.

³¹⁶ See: Appendix C.

³¹⁷ Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 160.

³¹⁸ Ibid., 160-161.

facilitate its use was adopted by the Canadian government in September 1958. The development of the CF-105 Avro Arrow fighter interceptor was also scrapped. The adoption of the BOMARC followed PJBD discussions that agreed that Ottawa should adopt US nuclear weapons and their delivery systems.³¹⁹

Diefenbaker was, for the sake of brevity, suspicious of the Canadian military, US foreign policy, and held a deep dislike for the PJBD.³²⁰ Additionally, Diefenbaker sought to supplant the PJBD via the creation of a ministerial-level Joint Ministerial Committee on Defence. This new forum was created to consider the political, economic, and military ramifications of future CANUS joint defence projects and include External Affairs, Defence, and Finance, and their US counterparts.³²¹ Hannah prompted Eisenhower to drop the PJBD in favour of the new ministerial-level committee, but a US government study requested by Eisenhower concluded that the Board served a “useful purpose” as a “permanent agency.”³²²

The Joint Ministerial Committee on Defence became dormant in 1960, until Kennedy and Diefenbaker’s successor, Lester B. Pearson, announced a new meeting to be held in 1964.³²³ This prompts the question of the PJBD’s ability to operate when the executive does not view it with high regard. The answer is straightforward. The PJBD only works when both the Prime Minister and the President view it as useful relative to the North American continental defence environment of the day.

The Ministerial Committee was often deadlocked as the members were principals who could not discuss policy-laden details with in-depth, high-political stakes.³²⁴ This is unlike the

³¹⁹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 291-292.

³²⁰ *Ibid.*, 285.

³²¹ *Ibid.*, 286-287.

³²² *Ibid.*, 287.

³²³ *Ibid.*, 288.

³²⁴ *Ibid.*, 289.

PJBD, where knowledgeable technocrats serve as a function of their government or service day positions. They are knowledgeable of all aspects of the continental defence file and by proxy of their positions, can cut across bureaucratic obstacles to expedite pressing issues to the executive for action. In later years, the Minister of External Affairs (now Global Affairs) in Canada and the Secretary of Defense in the United States received the PJBD's advice.

In addition to the new Ministerial Committee, Diefenbaker's government also created the Canada-United States Interparliamentary Group (CEUS) in 1959. It provided no advice to executives or their ministers/secretaries but instead functioned as an educational forum for lawmakers.³²⁵ Today, CEUS still provides "a forum for exchanges between Canadian and American legislators" via reports and conferences.³²⁶ Much like the Ministerial Committee, CEUS served an entirely separate purpose from what the PJBD was designed to do and did not supplant the Board. CEUS deals with a wide variety of joint Canada-US issues, including trade, softwood lumber, defence and security, energy, and the environment.³²⁷

Following the creation of the Joint Ministerial Committee on Defence and CEUS, the nadir of Canada-US relations came during the Cuban Missile Crisis in October 1962.³²⁸ While the PJBD and Diefenbaker had no role to play in resolving the crisis, the Board survived the tension between Kennedy and Diefenbaker. Domestic Canadian politics over topics the PJBD was advising on, particularly BOMARC missiles and US nuclear weapons stationed inside Canadian borders, thinned the Board's agenda further as Diefenbaker rejected the PJBD's advice. However, the

³²⁵ Ibid., 290.

³²⁶ Parliament of Canada, "Canada-United States Inter-Parliamentary Group (CEUS)," last accessed 29 May 2023, <https://www.parl.ca/diplomacy/en/associations/ceus/about>.

³²⁷ Ibid.

³²⁸ For a comprehensive examination of the Cuban Missile Crisis and Canada, see: Bill E. Featherstone, *Civil-Military Relations: The Case of Canada and the Cuban Missile Crisis*, M.A. thesis at the University of Manitoba, 2019, https://mspace.lib.umanitoba.ca/bitstream/handle/1993/34580/featherstone_bill.pdf?sequence=4&isAllowed=y.

Board was still actively utilized, providing advice on substantial and consequential issues of the day.³²⁹ The Ballistic Missile Early Warning System (BMEWS),³³⁰ renovation of communications facilities at Cape Dyer to support the DEW Line expansion,³³¹ approval for US operationalization of TACAN radar facilities in Canada,³³² and, anti-submarine training³³³ are just some examples. The PJBD also advised on different agreements for space and satellite provisions, including the upper-atmosphere research facility at Fort Churchill, a space radio signal tracking site in St. John's, and joint operations of meteorological satellites in 1962.³³⁴ In June 1961, advised that the Canadian government should assume responsibility for "manning, operation, and maintenance" of the fifteen Pinetree radar sites that the US previously were responsible for in Canada. As part of this this new responsibility, Canada also acquired F-101B and F-104G aircraft for its NORAD and North Atlantic Treaty Organization (NATO) commitments.³³⁵

4.5: The Permanent Joint Boondoggle³³⁶ (1964-1968)

This next period of the PJBD's existence was initially marked with optimism. Lester Pearson replaced Diefenbaker as Prime Minister and Lyndon Johnson became President upon Kennedy's assassination. US PJBD co-Chair Hannah resigned and was replaced by diplomat H. Freeman Matthews. Wilgress continued to serve under Pearson.³³⁷ The PJBD's June 1963 meeting

³²⁹ Beatty's dissertation repeatedly refers to advice during this era as recommendations. These recommendations are not in any academic literature, but it could be possible the PJBD made numbered, formal recommendations between 53/1 and 64/1. Furthermore, Beatty may be classifying all advice as "recommendations." As his citations rely on secondary sources or first-person interviews, it is difficult to discern.

³³⁰ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 292-293.

³³¹ *Ibid.*, 293-294.

³³² *Ibid.*, 294-295.

³³³ *Ibid.*, 295.

³³⁴ *Ibid.*, 295-298.

³³⁵ *Ibid.*, 297.

³³⁶ Raised in discussions by Dr. Joseph T. Jockel at "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023.

³³⁷ Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 161; See: Appendix A. "H. Freeman Matthews, Diplomat since 1920's: Obituary," *New York Times*, 21 October 1986, <https://www.proquest.com/docview/426305194?accountid=26396>.

in British Columbia saw over 15 agenda items and numerous reports were discussed.³³⁸ However, Conliffe claims the Board entered “limbo,” if not a death sentence, between 1964 and 1988.

The political changeover and new appointment of the US co-Chair in 1963 resulted in PJBD Recommendation 64/1.³³⁹ It is unknown what this formal recommendation discusses, but given the ongoing joint discussion over the use and placement of American nuclear weapons on Canadian soil, it can at least be speculated that the 1963 in-principle agreement to place US nuclear weapons in Canada negotiated by Kennedy and Pearson created the need for PJBD consultation on the matter.³⁴⁰ Beatty, while more positive of the “appreciable activity”³⁴¹ the PJBD had on matters of joint defence since 53/1 than Jockel and Conliffe are, does go so far as to say that the PJBD had been supplanted by 1969:

Notwithstanding the fact that the Board had a lot of business to consider after the break of the nuclear impasse in the early 1960’s, it may well play a decreasing role in the future defense of North America. By 1963, many highly integrated programs and a multitude of military agreements existed between Canada and the United States. The development of a joint North American air defense and the continual, intimate contact between the two nations’ military establishments at all levels led to a great deal of informal agreement and action outside the Board that could not have been foreseen in 1945.³⁴²

This period of the PJBD’s existence has sustained little academic attention. This can be attributed to two reasons: First, the classification of records for 25 years meant that researchers could not access Board meeting minutes, records of discussion, journals, or recommendations. Until 1988, updated PJBD information was spread through word-of-mouth via interviews or by proxy of appointment in the services, like which both Beatty and Conliffe relied upon.³⁴³ Conliffe

³³⁸ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 299-300.

³³⁹ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 161.

³⁴⁰ *Ibid.*, 300-301.

³⁴¹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 280.

³⁴² *Ibid.*, 311; Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 162.

³⁴³ Beatty relies heavily on primary interviews with Wilgress. Conliffe’s does not provide citations for some of his information, particularly Recommendation 64/1. See: Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 161.

further attributes the lack of prominence the co-Chairs have as explanation of the Board's relative "unimportance" and that the PJBD's "effectiveness has always been at the mercy of its principals."³⁴⁴

Second, Canada's strategic position in the world, relative to US interests, began to fade. Washington now had acute interests elsewhere in the world during the Cold War; NATO links and arrangements had strengthened, and the question of how to gain access to Canadian real estate for air defence purposes had largely been solved. Jockel's explanation of other institutions, such as NORAD, the MCC, and service-to-service links taking the planning function the Board once held also holds weight.³⁴⁵ It is worth noting that both Jockel and Conliffe served on the PJBD: Jockel served as the Acting US Section Secretary for the State Department in 1984-1985. Conliffe served as a Canadian Section RCAF representative sometime between 1963 and 1988.

The PJBD no longer was a link in the chain of command that provided formal recommendations and reports to the War Cabinet in Canada and the President in the United States. Jockel further questions the effectiveness of the discussions in PJBD meetings, given the Ogdensburg Agreement has no legal force or implications, and the Board is solely an advisory body with no policy-making ability. This blunts the impact the PJBD has on issues of the day.

Finally, Jockel refers to the Board as the "Permanent Joint Boondoggle," where nothing of great utility is discussed. Jockel, of course, would have direct knowledge having served as the PJBD US Section Secretary from 1984 to 1985, and by product of his State Department service. It has evolved into a talking shop that does not serve much purpose beyond field trips to places such

³⁴⁴ Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 162.

³⁴⁵ Raised in discussions by Dr. Joseph T. Jockel at "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023; Joseph T. Jockel and Joel Sokolsky, "Dandurand revisited: rethinking Canada's defence policy in an unstable world," *International Journal* 48, no. 2 (Spring 1993): 386.

as Key West, the Caribbean, and Calgary for the Section members who do not recognize the legacy of King, Roosevelt, and LaGuardia and the forward-thinking nature of the Ogdensburg Agreement.³⁴⁶ In *No Boundaries Upstairs*, the foundational literature on NORAD, Jockel further characterizes the PJBD as the following:

In 1953 the board went into eclipse, a state from which it has never recovered despite the 1954 efforts by Secretary of Defence Wilson to improve the integration of the Board's American section into the U.S. decision-making process. After its decline, PJBD meetings held at various defence bases in the U.S. and Canada deteriorated into field trips for military and civilian officials delighted to get away from their day-to-day responsibilities in Washington and Ottawa. The management of the defence relationship suffered as a result. The PJBD's decline was partially caused by a growing preference in Ottawa and Washington for defence discussions to be held on a more senior level. More significantly, the board was undercut by the direct links which the RCAF and USAF established between themselves.³⁴⁷

4.6: Filling in the Gaps (1969-1991)

Beatty's 1969 dissertation is the only comprehensive examination of the Canada-US Permanent Joint Board on Defence. After Beatty, Conliffe and Jockel take a pessimistic view of the Board's activity and utility until 1988. However, the PJBD still continued to provide advice during the Cold War. It was not entirely dormant, although its role had been greatly reduced after 53/1. The Board had fully transitioned from providing formal recommendations to providing more informal consultation. This is perhaps a function of both Diefenbaker and Kennedy disagreements and the increasingly complicated nature of CANUS defence cooperation. The technological knowledge that Board members required with the new offensive and defensive weapons far outpaced the need during the consequential wartime years. Paraphrasing historian Stacey, Conliffe's assessment of the Board is:

The formal recommendations did not constitute the entire record of the Board's work. The Board's meetings have always been characterized by informal discussions which are not reflected in the journals, and out of these discussions came a number of informal

³⁴⁶ Raised in discussions by Dr. Joseph T. Jockel at "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023.

³⁴⁷ Jockel, *No Boundaries Upstairs*, 125.

suggestions which went to one or both governments. To this day [1988], informal discussions which have no written record are a feature of Board meetings, and may well be the most important feature of the meetings. Similarly, informal or at least oblique suggestions seem to be preferred nowadays.³⁴⁸

Meeting minutes from the 1970s and 1980s, obtained by historian Lackenbauer and political scientist Lajeunesse, show that the Board played a “quiet but useful role in facilitating agreements” on continental defence.³⁴⁹ Such topics included US Strategic Air Command (SAC)/Aerospace Defense Command (ADCOM) Emergency Dispersal, negotiations over US air bases in Goose Bay and Argentina,³⁵⁰ implementing joint working and steering groups on the Airborne Warning and Control System (AWACS) in the 1970s amid reorganization of SAC, TAC, ADCOM, and Canadian Forces Air Command,³⁵¹ consultation on the transition and modernization of the DEW Line into the North Warning System (NWS) which reached the PJBD’s agenda before 1984,³⁵² underwater acoustic surveillance systems (SOSUS),³⁵³ and, it advised both governments to proceed on the North American Air Defence Modernization program in 1985 before the 1986 NORAD Renewal.³⁵⁴

As the PJBD further fulfilled its consultative role to study and advise rather than provide formal recommendations, it was routinely briefed on missile defence during the Cold War. Missile defence has long had wide-ranging political implications in Canada, particularly relating to

³⁴⁸ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 148.

³⁴⁹ Lackenbauer, “Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty,” 5.

³⁵⁰ Ibid.

³⁵¹ Ibid.; Joseph T. Jockel, *Canada in NORAD, 1957-2007*, 93-94.

³⁵² Lackenbauer, “Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty,” 5; Raised in discussions by Dr. Joseph T. Jockel at “The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration” in Colorado Springs in May 2023.

³⁵³ Lackenbauer, “Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty,” 4.

³⁵⁴ Ibid.

questions of American influence and concerns of Canadian sovereignty. The missile defence question also consistently brought NORAD renewal negotiations into the discussion.

The Board was first briefed on anti-ballistic missile defence (ABM) systems as early as spring 1965, when the United States provided both sections with a technical briefing. This was a function of the link between ABM and space assets that provided air tracking for NORAD.³⁵⁵ The first PJBD meeting to discuss NORAD's ten-year renewal was in 1966.³⁵⁶ In the October 1966 PJBD meeting, US co-Chair Matthews indicated that ABM deployment would have significant "implications for Canadian territory and airspace."³⁵⁷ The US State Department representative requested Canadian input on the strategic and international ramifications on ABM deployment, including the US strategic deterrence function and nuclear proliferation. Before the next PJBD meeting in February 1967, Pearson told his Cabinet that he had instructed Wilgress and the Canadian Section to remain neutral on NORAD renewal. A divisive Cabinet meeting over what would become the ABM (Sentinel) program as it related to NORAD's continental air defence mission followed. Pearson then instructed the new Canadian co-Chair, civil servant Arnold Heeney, to inform the US section during the June 1967 meeting in Montreal that Canada planned to continue air defence cooperation and was open to beginning negotiations on NORAD renewal."³⁵⁸

³⁵⁵ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 36, 39.

³⁵⁶ *Ibid.*, 70.

³⁵⁷ *Ibid.*, 42.

³⁵⁸ *Ibid.*, 42, 43, 47; See: Appendix A; Arnold Heeney, who served as principal secretary to Mackenzie King and had served on the IJC prior to his appointment as PJBD co-Chair, was most complimentary of the Board. He described the PJBD's "one great virtue" was the "mixed military-civil membership which made for really frank exchanges across departmental as well as national frontiers, and enabled short cuts to be taken in important advice to governments without having to resort to the frustration and delays of 'channels'." See: Brian D. Heeney, *The things that are Caesar's: The memoirs of a Canadian public servant* (Toronto: University of Toronto Press, 1972), 182, 189, 199.

The PJBD next held meetings from 18-22 September 1967 and discussed renewal of the NORAD agreement after ten years of the binational defence command's operationalization.³⁵⁹ Facilitated by the Board, the original NORAD agreement was renewed with the following caveats: a five-year renewal process, rather than the original ten-year; either Ottawa or Washington can withdraw from the NORAD agreement given a years' notice; and, Canada would not participate in the ABM (Sentinel) program.³⁶⁰

The MCC raised a pertinent issue relating to missile defence and the NORAD agreement renewal in late 1966. US officials discussed "changing NORAD's terms of reference from air to aerospace defence, citing the role of Space Detection and Tracking System in NORAD's Integrated Tactical Warning/Attack Assessment mission."³⁶¹ This did not change with the 1968 renewal. Sometime in 1968, stemming from the MCC's 1966 discussion, the PJBD discussed NORAD's terms of reference, specifically "the technical feasibility of separating air and space defence, the possibility of separating the two in the same complex in [NORAD headquarters] Cheyenne Mountain, and the implications of a separate ABM command and control system on NORAD effectiveness."³⁶² This particular example highlights the separation of the MCC and PJBD functions. The PJBD had evolved into a consultative body that could provide advice on the stickiest and most controversial joint defence policies because of its informal nature and closed-door access. A US co-Chair in the late 1970s stated the Board "has also never hesitated to air potential irritants of problems."³⁶³ The MCC, in contrast, with its entirely military composition,

³⁵⁹ Ibid., 49.

³⁶⁰ North American Aerospace Defense Command Office of History, *A Brief History of NORAD as of 31 December 2013*, (Colorado Springs, CO: NORAD Headquarters, 31 December 2013), 21; For a comprehensive examination of the 1968 NORAD Renewal, see: Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, Act 1.

³⁶¹ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 56.

³⁶² Ibid., 57.

³⁶³ Lackenbauer, "Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty," 5.

could consider the complex, technical questions brought on by technological advancement, but may be unable to advise as freely due to service constraints.

The PJBD was briefed for a final time on now ABM (Safeguard) on 23 June 1970. It is assumed given the importance of the topic to continental defence that the US co-Chair, then Andy Leroy Borg, told the Board that satellites were a more effective solution for ballistic missile early warning than would be radar sites in Northern Canada.³⁶⁴ It is also likely that at some point before 1975, the PJBD considered NORAD's mission suite addition of early warning for ABM via the Safeguard system, with C² falling to US Continental Air Defense Command (CONAD) with no Canadian involvement.³⁶⁵

Subsequent NORAD renewals in 1975, 1981 (1980 was postponed by one year), and 1986 were likely discussed at PJBD meetings, although the 1979 Joint US-Canada Air Defence Study (JUSCADS) was tasked with determining the North American air threat picture through to the end of the century.³⁶⁶ In 1976, the Canadian members of the PJBD proposed an ad-hoc group of senior defence officials from both governments to discuss how to “share responsibilities, including financial responsibilities, for modernization of the North American air defense system.”³⁶⁷ The US PJBD Section agreed to this proposal at the next Board meeting and formed the Ad Hoc Canada-United States Steering Group on the Sharing of Responsibilities for Modernization of the North American Air Defense System, but was largely rendered abandoned upon President Jimmy Carter's defence policy shift to NATO and Europe in 1977.³⁶⁸

³⁶⁴ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 65.

³⁶⁵ Ibid; James Fergusson, “NORAD Renewal – Much Ado about...,” *Wilson Center*, last accessed 29 May 2023, <https://www.wilsoncenter.org/sites/default/files/media/documents/event/One%20Issue%20Two%20Voices%20-%20Renewing%20NORAD.pdf>.

³⁶⁶ Jockel, *Canada in NORAD, 1957-2007*, 100.

³⁶⁷ John Anderson, “Canada and the Modernization of North American Air Defense,” in *The US-Canada Security Relationships: The Politics, Strategy and Technology of Defense*, eds. David Haglund and Joel Sokolsky (Boulder: Westview Press, 1989), 173.

³⁶⁸ Ibid., 173-174.

The 1981 renewal received significant public discourse in Canada regarding Ottawa's involvement in NORAD. The changes to the agreement were significant. The Canadian non-participation ABM clause was dropped. The term "air defence" was changed to "aerospace defence" to better reflect the indivisibility of air and low-earth orbit. Regional NORAD sectors were realigned, and the commitment to "[enhance] cooperation in space surveillance activities"³⁶⁹ were discussed.

The 1986 NORAD renewal arrived after the PJBD had discussed both the evolution of the DEW Line into the North Warning System and the Air Defence Modernization program of 1985. The 1986 renewal followed the March 1985 Shamrock Summit between Prime Minister Brian Mulroney and President Ronald Reagan where their close, personal relationship made agreements easier to negotiate. Details for the North Warning System, Over-the-Horizon Backscatter radar (OTH-B) in the United States, AWACS aircraft, Forward Operating Locations (FOLs), Dispersed Operating Bases (DOBs), and communications systems were finalized.³⁷⁰ Previous PJBD meetings before 1984 discussed these new commitments.³⁷¹

The 1985 NORAD Modernization cycle occurred at the same time as the CJCS created US Space Command, inactivated ADCOM, and proposed the creation of US Element NORAD.³⁷² This was solely US decision-making relative to the US Unified Command Plan, meaning the PJBD likely was not involved. However, it is likely that the MCC was at least briefed on the changes and how it would affect NORAD, and it could have possibly been communicated to Canadian defence

³⁶⁹ North American Aerospace Defense Command Office of History, *A Brief History of NORAD as of 31 December 2013*, 25.

³⁷⁰ Government of Canada, *Exchange of Notes Constituting an Agreement Between the Government of Canada and the Government of the United States of America on the Modernization of the North American Air Defence System E101003*, CTS 1985 No. 8, 18 March 1985, <https://www.treaty-accord.gc.ca/text-texte.aspx?id=101003>.

³⁷¹ Raised in discussions by Dr. Joseph T. Jockel at "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023.

³⁷² *Ibid.*, 26.

officials via PJBD for their input regarding the NORAD side. After the flurry of activity on continental air defence in the early and mid-1980s, it is most telling that the Canadian PJBD co-Chair position was left vacant from 1987-1988. This is indicative of the PJBD's ebbs and flows in activity during large cycles of NORAD modernization, where continental defence is a perennial priority given external threat factors to North America.

Missile defence briefly resumed activity on the PJBD's agenda in the spring of 1989. The Strategic Defense Initiative (SDI) was the latest US-proposed defence system against intercontinental ballistic missiles (ICBMs) and submarine-launched ballistic missiles (SLBMs). US PJBD Section members briefed the Canadian section on the "SDA 2000 Phase II Report," but the PJBD referred the "issue of strategic defence cooperation" to the MCC. In May 1989, the USAF officials on the MCC, based on Canadian Prime Minister Mulroney's refusal to commit Canada to SDI research, "rejected Canada's request for full participation in the aerospace strategic defence planning process."³⁷³ The sticky political discussion occurred in the PJBD, whereas the MCC dealt with the strategic ramifications of the decision.

From 1969 to 1991, the PJBD continued its "role in facilitating information sharing, consultation, and participation in policy formation."³⁷⁴ The geopolitical environment had changed by the early 1990s. The Berlin Wall fell in 1989, the Soviet Union dissolved in 1991, and the Cold War was over. The threat of nuclear exchange between the United States and Soviet Union had been greatly reduced. Continental defence was no longer a priority for political decision-makers; North America was again viewed as a sanctuary as Washington emerged as the unipolar great

³⁷³ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 124.

³⁷⁴ Lackenbauer, "Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty," 5.

power. The PJBD, NORAD, and the future of Canada-US defence cooperation had begun a new era.

Chapter 5: Post-Cold War, 9/11, and The Return of Great Power Competition

5.1: The Continent is a Sanctuary (1992-2001)

As the PJBD does not issue communiqués and its meetings are confidential, much of this latest history of the PJBD has to be pieced together by mentions of meetings in the media, events, interviews, rare public press releases, and inference. The last paper dedicated solely to the PJBD was Beatty's 1969 dissertation, which only covers until 1964. Below, therefore, represents the only public record of the PJBD's activities since the publication of his thesis.

The United States emerged from the Cold War as the unipolar hegemon. The inherent threat of nuclear annihilation, regularly re-emphasized by Soviet exercise flights near North American airspace in the Arctic, had been removed from the continental defence equation. Great Power Competition was replaced with a myriad of other international security concerns and asymmetric defence and security threats. The 1990s were the decade of ethnic conflicts and United Nations (UN) missions abroad. Given a mounting national debt, Prime Minister Chrétien cut spending to the CAF considerably. The 1990s were referred to by defence economists as the “decade of darkness.”³⁷⁵ Scholars Jockel and Christopher Sands, both Americans, noted that the “Canadian forces have been reduced to the point where their role is largely ‘symbolic’,”³⁷⁶ and “the U.S. has never been happy with the low level of Canadian defense spending.”³⁷⁷ In 2005, former US PJBD co-Chair Dwight N. Mason, who served from 1994 to 2002,³⁷⁸ re-emphasized their sentiments by

³⁷⁵ Crystal Kipping-Wyatt, “The Canadian Armed Forces: On the Precipice of a Second Decade of Darkness?” *Canadian Forces College*, 2022, <https://www.cfc.forces.gc.ca/259/290/24/192/Kipping.pdf>.

³⁷⁶ Christopher Sands, “How Canada Policy is Made in the United States,” in *Canada Among Nations 2000: Vanishing Borders*, eds. Maureen Appel Molot and Fen Osler Hampson, (Toronto: Oxford University Press, 2000), 67.

³⁷⁷ Joseph T. Jockel, “Canada-U.S. Defense Relations in the 1990s,” in *Fifty Years of Canada-United States Defense Cooperation: The Road From Ogdensburg*, eds. Joel Sokolsky and Joseph T. Jockel, (Lewiston, New York: The Edwin Mellen Press, 1992), 387.

³⁷⁸ See Appendix A.

stating that “the U.S. Section of the PJBD has been making the same point [over the lack of Canadian defence spending] since 1994.”³⁷⁹ Some analysts suggest Canada is about to enter the second decade of defence spending darkness in 2023 and beyond. Between 1992 and 2001, the PJBD held bi-annual meetings, on topics ranging from missile defence and NORAD renewal to the Y2K bug and fallout from the Northeast ice storms, which are outlined below.

In 1989, given the lack of Soviet threat, the United States Congress authorized the DoD to be the lead agency responsible for “detecting and monitoring the smuggling of illegal drugs into the country.”³⁸⁰ Illegal drug trafficking had been a perennial US security concern. NORAD, by proxy of its aerospace warning and aerospace control missions, was designated the responsible agency “to detect and monitor suspected airborne drug traffic.”³⁸¹ This new US priority was included in discussions over the 1991 NORAD renewal. The binational defence command was not altered, besides the inclusion of a small sentence stating that drug interdiction was in the interest of both Canada and the United States. It is unclear if the PJBD had a role to play in the 1991 renewal process, but it can be inferred that it at least came across the Board’s agenda at some point in 1989 or 1990. Typically, the PJBD and the governments had several discussions leading up to the renewal. As the Soviet Union had collapsed, NORAD and NATO were in search of new roles and drug interdiction fit NORAD’s air surveillance mandate.³⁸² An external study commissioned by NORAD after the 1991 renewal highlighted:

The major changes that have occurred in the strategic environment and the changes resulting from emerging Canadian and US policies and strategies indicate a very uncertain future for NORAD. It is possible that NORAD could be faced with a reduced mission, a

³⁷⁹ Dwight N. Mason, “The future of Canadian-US defense relations,” *The American Review of Canadian Studies* 33, no. 1 (Spring 2003), 73.

³⁸⁰ Jockel, *Canada in NORAD, 1957-2007*, 138.

³⁸¹ *Ibid.*

³⁸² Raised in discussions by Dr. Joseph T. Jockel at “The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration” in Colorado Springs in May 2023.

reduced capability, or becoming non-viable as a command in the absence of a coherent and compelling strategy that fully takes into account the new strategic environment.³⁸³

Missile defence was again an agenda item in the spring 1992 PJBD meeting held in Charleston, South Carolina.³⁸⁴ A discussion between Prime Minister Mulroney and President George H.W. Bush concerning the new US missile defence initiative Global Protection against Limited Strikes (GPALS) occurred before the meeting. Following the executive discussion, US PJBD Section members provided the Canadian Section with a detailed briefing on GPALS. The US further proposed that the next step of discussion be over Canadian interests and intentions via a “US inter-agency team” the next month before discussions around command and control were held. As Mulroney said no to Canadian participation in Strategic Defense Initiative (SDI) research in 1985 (GPALS’ predecessor), the US tacitly suggested the early warning function for GPALS would bypass NORAD and go to a solely US-operated agency.³⁸⁵

The 1996 NORAD renewal came after extensive binational discussions regarding missile defence and NORAD’s “Global Warning Initiative” concept. The concept would provide “integrated warning and assessment” to both Canada and the United States and a proposed a NORAD Joint Early Warning Center. Canada and the United States could not find consensus over National Missile Defence (NMD), GPALS’ successor under President Clinton. However, Canada supported the global warning concept as it would support the US strategic nuclear deterrence and as a “highly visible effort for international peace and security.”³⁸⁶ NORAD renewal negotiations saw the Canadians desire for the global warning initiative and the Americans desire for mention of Canadian participation in missile defence. Neither objective was included in the text of the agreement. The renewal, as a product of Canadian legislation that required environmental

³⁸³ Jockel, *Canada in NORAD, 1957-2007*, 145.

³⁸⁴ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 144.

³⁸⁵ Ibid. Cited as: Department of External Affairs; Report on PJBD Meeting; March 16, 1992.

³⁸⁶ Jockel, *Canada in NORAD, 1957-2007*, 152.

considerations in international agreements, did include a provision that the PJBD would review “environmental matters related to NORAD operations.”³⁸⁷ It is unclear where the PJBD review would go once the Board considered the matter, although it is likely it went to both the respective Defence and State/Foreign Affairs departments and then back to NORAD.

In addition to NORAD’s environmental matters, the PJBD also considered issues in non-traditional defence and security domains. The Board encouraged “extensive” study by both governments on emerging issues during the 1990s. Repeated power outages across Canada and the United States created the need to address the issue as a security concern that could render both countries stasis: the 1996 blackout in seven western states, B.C., and Alberta left 2 million customers without electricity;³⁸⁸ the North American Ice Storm of 1998 left 3.5 million people in Ontario, Québec, and northeastern states in the dark and caused \$3 billion of damage;³⁸⁹ and in the 2000s, the 2003 Northeastern Blackout in Ontario and the northeast US caused 100 fatalities and left 55 million customers with no electricity for up to four days.³⁹⁰ It was clear to the PJBD that integrated electrical grids created the need for discussion and to provide advice to both governments on creating resiliency and redundancy and creating cooperation to manage these systems effectively.

Another non-traditional security issue at the end of the 1990s was the Y2K computer software bug (also known as Doomsday 2000). In the mid-1960s, computer scientists had coded years in systems and algorithms as two-digits (i.e. 99 for 1999) and when the year 2000 rolled over, the computer systems were arranged to think ‘00’ would refer to the year 1900. This had

³⁸⁷ Ibid., 153-154.

³⁸⁸ The Associated Press, “Millions Lose Electric Power In the West,” *The New York Times*, 11 August 1996, <https://www.nytimes.com/1996/08/11/us/millions-lose-electric-power-in-the-west.html>.

³⁸⁹ Charron and Fergusson, *NORAD: In Perpetuity and Beyond*, 44.

³⁹⁰ CBC Archives, “The great North America blackout of 2003,” *CBC News*, 21 June 2018, <https://www.cbc.ca/archives/the-great-north-america-blackout-of-2003-1.4683696>.

potentially catastrophic consequences for mortgage calculators and the finance industry, airline computer systems and the transportation sector, to nuclear power plant cooling systems and the energy sector. The United States alone spent \$100 billion to mitigate the risks to an increasingly digital society. The US Congress, the Clinton White House, and the World Bank all created committees to coordinate US and international efforts.³⁹¹ The PJBD was used as a mechanism to coordinate Canada and US efforts on reducing the risks to each country, as untold number of people and goods move across each border every day, let alone the defence needs of NORAD's airframe systems would rely on the same computer system. The Y2K bug was an existential threat to the daily life in North America. Given its sensitivity and ticking clock, the PJBD was able to "stimulate U.S.-Canadian cooperation" on the problem.³⁹² There were still hundreds of relatively minor issues come 1 January 2000, such as ATMs not being able to process "declined" credit cards, but widespread, epistemic failure of vital systems did not happen.

The 2000 NORAD renewal, which came into effect in March 2001, remained status quo as Ottawa sought to avoid discussions around the US National Missile Detection (NMD) program. NORAD had been pejoratively referred to as "SNORAD" throughout the 1990s, as continental defence was rendered a lesser priority given the fall of the Soviet Union.³⁹³ NORAD was not subject to acute political scrutiny from either country. On the one hand, this meant NORAD was under less pressure to perform. On the other hand, it became increasingly difficult for the NORAD Commander to justify increased funding for upgrades from US Congress or Canadian Parliament.³⁹⁴ Canada and the United States did not view these non-traditional threats differently,

³⁹¹ Zachary Loeb, "The lessons of Y2K, 20 years later," *Washington Post*, 30 December 2019, <https://www.washingtonpost.com/outlook/2019/12/30/lessons-yk-years-later/>.

³⁹² Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 6.

³⁹³ Charron and Fergusson, *NORAD: In Perpetuity and Beyond*, 28.

³⁹⁴ *Ibid.*, 21, 28; Raised in discussions by Dr. Lance Blyth at "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023.

allowing the PJBD to discuss avenues to achieve mutual cooperation on these emerging threats that had the possibility for widespread chaos for national security. The geopolitical condition of American unipolar hegemony remains until continental defence becomes a renewed priority in late 2001.

5.2: 9/11 and its Aftermath (2002-2013)

The September 11th, 2001 (9/11) terrorist attacks in New York, Pennsylvania, and Virginia created shocks in the security communities and between Canada and the United States, “[revealing] gaps and deficiencies in current security arrangements” with an asymmetric, non-conventional terrorist threat.³⁹⁵ The main problem was that the US public, including senior political officials, wrongly assumed the terrorists originated from Canada.³⁹⁶ 9/11 was the first attack on one of the 50 US states since Pearl Harbor. The US security community needed to reorganize, but so did the CANUS relationship. After all, Canada had harboured the transatlantic flights inbound to the United States and so if there was another terrorist attack in the making, it was likely to affect Canada too. Additionally, NORAD was the main line of defence against air threats like 9/11 and yet it failed to prevent the attacks. NORAD was under political and public scrutiny like never before. As the United States shifted to create a new combatant command for continental US (what would become US Northern Command or USNORTHCOM) and a new civilian agency (Department of Homeland Security or DHS) to manage security, NORAD was reexamined. While Charron and Fergusson confirm NORAD’s disappearance was never on “the table,”³⁹⁷ its relationship to these new commands and agencies needed to be considered carefully.

³⁹⁵ Mason, “The future of Canadian-US defense relations,” 67.

³⁹⁶ In 2009, the then-US Secretary of Homeland Security Janet Napolitano and the 2008 Republican nominee for President Senator John McCain reiterated the myth that the 9/11 hijackers came from Canada, which prompted pushback from the Canadian Ambassador and Canadian Finance Minister. See: Lee-Anne Goodman, “9/11 terrorists came from Canada, McCain insists,” *The Canadian Press* via *The Toronto Star*, 24 April 2009, https://www.thestar.com/news/world/2009/04/24/911_terrorists_came_from_canada_mccain_insists.html.

³⁹⁷ Charron and Fergusson, *NORAD: In Perpetuity and Beyond*, 28-54.

With initial internal US discussions over the formation of the new US Combatant Command (CoCOM) responsible for North America (USNORTHCOM), the PJBD discussed “how Canada and the United States ought to defend North America in the post-September 11 world.”³⁹⁸ These discussions took place sometime between late 2001 and the operationalization of USNORTHCOM in 2002. Former US PJBD co-Chair Dwight N. Mason, who served from 1994 to 2001, states it was apparent to both Canadian and US officials that the same issues of warning, characterization, and action that created NORAD, relative to the threats in the air and space domains, was now needed for the land and maritime domains.

The US PJBD Section “informally suggested” that NORAD be expanded beyond the aerospace domain to include both land and sea, building on years of cooperation and close practices to address “coastal maritime surveillance” and “consequence management on land.”³⁹⁹ US Secretary of Defense Rumsfeld approached Canadian Minister of National Defence Eggleton to discuss an all-encompassing “North American Defense Command” at some point in late 2001 or 2002.⁴⁰⁰ The Canadian PJBD Section did not agree to an expanded NORAD (at least not on this scale) and neither did Ottawa, as it was a “bridge too far.”⁴⁰¹ In 2003, the Canadian government agreed with the United States on the creation of a Bi-National Planning Group (BPG) (initially named the Bi-National Planning Cell) to explore options to create closer CANUS defence and security cooperation.⁴⁰² The BPG was made up of senior leadership, co-directors, Canadian Forces members, US military members, and US contractors. The final report was overseen by then Lieutenant-General Findley (who was the NORAD Director of Operations on 9/11 and ensured

³⁹⁸ Dwight N. Mason, “The Canadian-American North American defence alliance in 2005,” *International Journal* 60, no. 2 (Spring 2005): 289.

³⁹⁹ *Ibid.*

⁴⁰⁰ Charron and Fergusson, *NORAD: In Perpetuity and Beyond*, 45.

⁴⁰¹ *Ibid.*

⁴⁰² Mason, “The Canadian-American North American defence alliance in 2005,” 289.

the closure of US airspace by the Federal Aviation Administration (FAA)) in his role as the Canadian NORAD Deputy and Lieutenant General Inge in his role as Deputy of USNORTHCOM. As a proxy of their service positions, the BPG membership changed from the 2004 interim report to the 2006 final report.⁴⁰³

Mason, the former US PJBD co-Chair, explained the new environment:

The United States and Canada began looking at these new conditions intensively in the PJBD, and then the MCC starting in September 2001. One idea considered was to use the example of NORAD, perhaps by expanding NORAD itself to include land and sea forces. Subsequently, a special high-level U.S. Canadian working group [the Bi-National Planning Group] was organized to examine the question in detail, and in June 2002, the Canadian Cabinet authorized the Department of National Defence to enter into negotiations with the U.S. to improve defense cooperation. It was anticipated that any new military cooperation between the U.S. and Canada for the defense of North America would take place at NORAD.⁴⁰⁴

Expanding on the initial PJBD discussions, the BPG was initiated as a temporary high-level military advisory group that would provide advice to the Canadian Minister of Foreign Affairs and the US Secretary of State. The BPG origins are twofold: First, the creation of USNORTHCOM in April 2002, which created the dual-hatted NORAD/USNORTHCOM commander at NORAD headquarters in Colorado Springs and re-aligned the US Unified Command Plan (UCP) by removing the Space Command-NORAD link and placing it under US Strategic Command (USSTRATCOM).⁴⁰⁵ Second, the Canada-United States' Agreement for Enhanced Military Cooperation in December 2002 tasked the BPG with examining the "full scope of possible, expanded CANUS/North American defence and security cooperation frameworks" under the lead of the Canadian Deputy NORAD Commander.⁴⁰⁶

⁴⁰³ Bi-National Planning Group, *The Final Report*, Appendix A.

⁴⁰⁴ Mason, "The future of Canadian-US defense relations," 67.

⁴⁰⁵ For more, see: Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 218-226.

⁴⁰⁶ Charron, et. al, "LEFT of BANG'," 8.

The Interim BPG Report was issued to the Minister of Foreign Affairs and Secretary of State in October 2004. The report made minor recommendations for the PJBD. It asked three questions:

Should the [PJBD] membership be expanded to include representatives from the [Department of Homeland Security] (DHS) and [Public Safety and Emergency Preparedness Canada] (PSEPC) due to overlapping areas of responsibility with DoD and DND respectively? Should the terms of reference be expanded to encompass both defense and security? Should this body be renamed to the Permanent Joint Board on Defense and *Security*?⁴⁰⁷ (emphasis added)

The Final BPG Report in March 2006 addressed the addition of DHS and PSEPC members to both the Canadian and American Sections of the Board, which was discussed in PJBD meetings in October 2005 and March 2006 but had yet to be implemented.⁴⁰⁸ DHS and PSEPC members were included sometime between March 2006 and January 2020.⁴⁰⁹ Importantly, and perhaps in an attempt to revive the PJBD to its former levels of activity during the early-1950s, the BPG's "Political-Level Coordination" recommended:

The [PJBD] should build on its addition of representatives from PSEPC and DHS as full partners. This will provide a strategic forum for senior CANUS decision makers to discuss overlapping continental defense and security issues; it will also provide optimum opportunity for the Co-Chairs of the PJBD to brief key defense and security matters to the Prime Minister of Canada and the President of the United States in a comprehensive and timely manner.⁴¹⁰

Interestingly, the final BPG Report recommendation on "Political-Strategic Defense and Security Coordination" advised that a supplemental "small, advisory organization that consists of civilian and military members to focus upon continental security and defense issues" could provide

⁴⁰⁷ Bi-National Planning Group, *Interim Report on Canada and the United States (CANUS) Enhanced Military Cooperation*, (Peterson Air Force Base, Colorado Springs: 13 October 2004), 32, <https://www.hsdl.org/?view&did=461253>.

⁴⁰⁸ *Ibid.*, 32, 53.

⁴⁰⁹ Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 4.

⁴¹⁰ Bi-National Planning Group, *The Final Report*, 32, 53.

support to the PJBD.⁴¹¹ This recommendation called for an additional organization to provide support to the PJBD that could be “scalable” to include Mexico’s cooperation in North American defence and security issues.⁴¹² This new advisory organization has never materialized but was likely a by-product of US President George W. Bush and Mexican President Vicente Fox’s close and personal relationship. The PJBD’s role as a political-diplomatic forum that deals with continental defence and security issues was explicitly stated on paper in 2006 for the first time in the Board’s history. The BPG Final Report further advocated for the PJBD by saying:

[The PJBD] provid[es] senior level recommendations on the synchronization of diplomatic, informational, military and economic elements of power, we will achieve enhanced cooperation among CANUS defense and security organizations for the aerospace, maritime, land and cyber defense of North America.⁴¹³

The last recommendation contained in the BPG *Final Report*, relative to the PJBD and its future meeting agendas, was the addition of a maritime warning mission for NORAD, complementing its aerospace warning and aerospace control missions. There was significant concern among decision-makers that terrorists could exploit the maritime domain with crude weapons consisting of cruise missiles or biological or chemical weapons on vessels entering North America.⁴¹⁴ Rumsfeld’s hypothesized “North American Defense Command” would be a step closer to reality. NORAD could now warn of maritime-based threats approaching North America such as a cargo ship with biochemical or nuclear weapons that could be offloaded at ports in North America.⁴¹⁵ The Canadian CDS and the US CJCS had the final say on the addition of maritime warning, which was duly given.⁴¹⁶

⁴¹¹ Ibid., 32-33.

⁴¹² Ibid.

⁴¹³ Ibid., 34-35.

⁴¹⁴ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 221.

⁴¹⁵ Charron and Fergusson, *NORAD: In Perpetuity and Beyond*, 45.

⁴¹⁶ Andrea Charron and James Fergusson, “NORAD in Perpetuity? Challenges and Opportunities for Canada,” *Centre for Defence and Security Studies*, 31 March 2014, 3-4, https://umanitoba.ca/centres/cdss/media/0_NORAD_in_Perpetuity_final_report_March_2014.pdf.

A month after the March 2006 BPG *Final Report* was issued, the NORAD Agreement was renewed indefinitely.⁴¹⁷ This meant that PJBD and MCC did not need to review renewal agreements every five or so years. Even with the indefinite nature of the agreement, the once-regular five-year NORAD renewal process and four-year review process remained in the PJBD's purview:⁴¹⁸ "The review process and possible [Terms of Reference] (TOR) additions reside largely in the area of day-to-day management or caretaking, far removed from the political limelight, and vested in the hands of defence officials on both sides of the border."⁴¹⁹ Even with NORAD's indefinite renewal, the PJBD had a future role to play in the expanded defence and security relationship, buffeted with political support, after 9/11. The Board has continued to discuss and support the maritime warning NORAD mission in meetings after 2006.⁴²⁰

The Final BPG Report was authored and released following Canada's declined participation in the latest US BMD project - Ground-based Midcourse Defense (GMD). In February 2005, the Canadian Minister of Foreign Affairs announced in the House of Commons that Canada would not participate, "at least at this time."⁴²¹ Canadian political dynamics, akin to the CANUS nadir of the late 1950s and early 1960s, included Anti-Americanism, a divided government, and an indecisive Prime Minister.⁴²² It is unlikely that the PJBD had a role to play in Canada's decision. As the PJBD allows for frank and private conversations on particular defence topics away from the public spotlight to be expedited across the military or civil bureaucracies to the executive, it could have been a venue for this discussion. It would have been most beneficial

⁴¹⁷ Government of Canada, *Agreement Between the Government of Canada and the Government of the United States of America on the North American Aerospace Defense Command E105060*, 28 April 2006, <https://www.treaty-accord.gc.ca/text-texte.aspx?id=105060>.

⁴¹⁸ *Ibid.*, 3-4.

⁴¹⁹ *Ibid.*, 4.

⁴²⁰ Charron, et. al, "LEFT of BANG'," 17.

⁴²¹ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 251.

⁴²² *Ibid.*, 247.

for the CANUS relationship writ large for a Canadian “no” to have been given to the United States at a PJBD meeting before the announcement in the House of Commons so that the US section had time to prepare the President. Leaders hate surprises.

In 2012, the PJBD advised on a “Tri-Command Framework for Arctic Cooperation.” The Tri-Command consists of NORAD, USNORTHCOM, and Canadian Joint Operations Command (CJOC). These three institutions create the military arrangements responsible for continental defence. The framework resulted in numerous cooperative mil-to-mil activities, such as Operation NANOOK, ICEX, Arctic SAREX, Capability Gap Analysis, and an Employment and Support Plan for the North. The objective was to “promote enhanced military cooperation in the preparation for and the conduct of defence, security, and safety operations in the Arctic” via planning, operations, increasing domain awareness and information sharing, training and exercises, capability development, and science and technology.⁴²³ The CAF continues to run Operation NANOOK every year in the Arctic to learn, train, exercise, and gain knowledge from and with allies.⁴²⁴

5.3 The Return of Great Power Competition (2014-2023)

The geostrategic environment began to change in the early 2010s. Four instances contributed to the return and rise of Great Power Competition between the United States, Russia and China. First, the technological development of long-range air and sea-launched cruise missiles (ALCMs and SLCMs) that could be launched from deep within the North Atlantic, Barents Sea, and Arctic Ocean by Russia. This development rendered the existing North Warning System (NWS), the radar system that supports NORAD’s aerospace warning mission and detects incoming

⁴²³ Charron and Fergusson, “NORAD in Perpetuity? Challenges and Opportunities for Canada,” 57.

⁴²⁴ Government of Canada, “Operation NANOOK,” *Department of National Defence*, 17 February 2023, <https://www.canada.ca/en/department-national-defence/services/operations/military-operations/current-operations/operation-nanook.html>.

aerial threats through the North American Arctic, as obsolete. Canada and the United States now lacked situational awareness with respect to the Arctic avenues of approach.⁴²⁵

Second, the Russian annexation of Crimea from Ukraine in 2014 threatened European security and North American defence and showed that the former Cold War rival was re-emboldened. Third, the Russian development and testing of hypersonic cruise missiles and hypersonic glide vehicles (HGVs) in 2017 posed new aerial threats.⁴²⁶ Moving at mach speeds and maneuverable in-flight, there is no defence against them. Neither the NWS nor the US Ballistic Missile Early Warning Systems (BMEWS) can track these new weapons.⁴²⁷ Finally, the economic might of the Chinese Communist Party (CCP) began to spread as ambitious soft-power plans, such as the Belt and Road Initiative (BRI) and the Polar Silk Road, were proposed to states around the world in exchange for Chinese influence and/or strategic military outposts.

These four issues were certainly topics of interest for the PJBD to discuss. In 2011, the number of PJBD meetings was reduced from two to only one per year, likely agreed to by ADMPol and the OSD(P) but remains without explanation as to why.⁴²⁸ The United States also left their co-Chair position vacant twice: first, from 2009-2011 and again in 2016-2017.⁴²⁹ It is likely the PJBD continued to meet without the US co-Chair, although no official record of the meeting is public

⁴²⁵ James Fergusson, “The Changing Arctic: Will the Arctic see greater military engagement or continued cooperation? Canadian and Icelandic perspectives,” *North American and Arctic Defence and Security Network and Institute of International Affairs of the University of Iceland*, Notes taken by Nicholas Glesby at Keynote presentation, 7 June 2023, National Museum of Iceland, Reykjavík, Iceland.

⁴²⁶ Hypersonic cruise missiles and HGV’s are two different weapons. Hypersonic glide vehicles (HGV) are launched from a rocket before gliding to a target and skips along the earth’s atmosphere. Hypersonic cruise missiles are powered by high-speed, air-breathing engines, or “scramjets,” after acquiring their target.

⁴²⁷ Fergusson, “The Changing Arctic: Will the Arctic see greater military engagement or continued cooperation? Canadian and Icelandic perspectives.”

⁴²⁸ Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.

⁴²⁹ See Appendix A. Raised in discussions by Dr. Lance Blyth at “The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration” in Colorado Springs in May 2023. It was hypothesized that perhaps the US has historically undervalued the PJBD as a function of its strength and power in the broader CANUS relationship.

knowledge. There is precedence for meetings held without one of the co-Chairs, as the first Canadian co-Chair Biggar was replaced by Acting co-Chair McNaughton in 1944-1945 due to illness.⁴³⁰ In following years, the Canadian co-Chair would normally be represented by the External Affairs member (not the Secretary) in their absence, although Canadian co-Chair Wilgress (1959-1967) would also delegate service members to serve as co-Chair when he could not attend.⁴³¹

Between 2011 and 2015, the PJBD made at least five formal recommendations. The specifics of the implementation of this advice remain in the classified realm. Issues of “interest in both countries” included the Arctic (particularly the NWS, Arctic sea lanes of communications, and the longtime Canadian F-35 procurement process), NORAD, Coast Guard cooperation (with both US and Canadian Coast Guard representation on the PJBD), and cooperation with US Southern Command (USSOUTHCOM) and Joint Interagency Task Force South (JIATF) on drug trafficking.⁴³² Other discussions include endorsement of the “Beyond the Border” initiative to secure the shared border and expedite lawful travel and trade (and increased cooperation between DHS and PSEPC), and was signed by Prime Minister Harper and President Obama in 2011.⁴³³ The PJBD also discussed, but did not include in the formal recommendations, resource development and cultural impacts on Inuit relative to increased attention to the Arctic.⁴³⁴ Furthermore, the “decade of darkness” sentiment of the 1990s apparently did not affect the CANUS relationship in

⁴³⁰ Keenleyside, “The Canada-United States Permanent Joint Board on Defence, 1940-1945,” 75.

⁴³¹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 85.

⁴³² Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.

⁴³³ Ibid.; Government of Canada, “Beyond the Border: A Shared Vision for Perimeter Security and Economic Competitiveness,” *Public Safety Canada*, 15 February 2018, <https://www.publicsafety.gc.ca/cnt/brdr-strtg/bynd-th-brdr/index-en.aspx>.

⁴³⁴ Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.

the first years of the 2010s. The US was, in fact, content with the Canadian contribution to defence and security efforts, particularly relative to Ottawa's contribution in Afghanistan and the war against the Taliban.⁴³⁵

From 2011-2015, the PJBD met in Ottawa, Washington D.C., and Colorado Springs (NORAD Headquarters) for multi-day meetings with dinner and social aspects. The US co-Chair was John M. Spratt Jr. (a longtime Democratic Congressman from South Carolina who had just lost his Congressional seat) and the Canadian co-Chair was The Honourable Laurie Daniel Hawn (a former RCAF Lieutenant-Colonel and Conservative Member of Parliament).⁴³⁶ The Board met twice in 2011, and once every year from 2012-2015. Annual meetings remain status quo in 2023.⁴³⁷ The meetings were always congenial and respectful, but often had an undercurrent of the geopolitical situation of the day (such as Crimea in 2014) and the representatives were not afraid to say "why" their viewpoint was such. There were upwards of fifteen people at these meetings, including the co-Chairs, service and government representatives, support staff with expert knowledge, and 4-star US generals and 3-maple leaf Canadian generals would sometimes also participate (the NORAD and USNORTHCOM Commander and the CJOC Commander). For the Canadian Section, the meetings reports compiled by the Secretary would accompany the official letter to the Prime Minister, informing he or she of the proceedings and the agenda of the next meeting.⁴³⁸

⁴³⁵ Ibid.

⁴³⁶ See Appendix A.

⁴³⁷ Government of the United States, "Readout of the 240th Meeting of the U.S.-Canada Permanent Joint Board on Defense, *U.S. Department of Defense*, 28 October 2022, <https://www.defense.gov/News/Releases/Release/Article/3203702/readout-of-the-240th-meeting-of-the-us-canada-permanent-joint-board-on-defense/>.

⁴³⁸ Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.

In 2013, the PJBD commissioned the “NORAD Next” study, to be completed by NORAD personnel. Looking far out into the future, NORAD Next would “examine future North American defence requirements.”⁴³⁹ The study quickly expanded in scope as successive NORAD and USNORTHCOM commanders (Jacoby, Gortney, and Robinson) sought to re-envision the study to address emerging technologies, the bilateral roles Canada and the United States could play in the future of North American defence, and organizational structures and processes. The original impetus for the PJBD’s request for the NORAD Next study was for NORAD to continue the BPG’s work on enhancing CANUS military cooperation.

The scope of NORAD Next (which was to project NORAD into the future 25 plus years) was thought too large a study. A new study was adopted which included six domains (air, maritime, cyber, aerospace, outer space, and land) and even undiscovered or untapped domains, such as the cognitive domain. This new study, Evolution of North American Defence (EvoNAD), replaced NORAD Next. Parts of EvoNAD were briefed by NORAD to the PJBD in 2016, beginning with the air and aerospace domains. The new study went beyond just NORAD to include all of North American defence.⁴⁴⁰ It is unclear how many of the chapters of EvoNAD were completed and briefed to the Board as NORAD Modernization efforts (the need for new radars, satellites, sensors, and command and control systems, to name a few elements) began, in earnest, in 2017, superseding the EvoNAD study. The 2017 joint statement from Prime Minister Trudeau and President Trump and Trudeau and President Biden’s 2021 “Roadmap for a Renewed U.S.-Canada Partnership”⁴⁴¹

⁴³⁹ Andrea Charron and James Fergusson, “NORAD and the Evolution of North American Defence,” *Macdonald Laurier Institute*, 24 May 2017, <https://www.macdonaldlaurier.ca/norad-and-the-evolution-of-north-american-defence-andrea-charron-and-james-fergusson-for-inside-policy/>.

⁴⁴⁰ Andrea Charron and James Fergusson, “From NORAD to NOR[A]D: The Future Evolution of North American Defence Co-operation,” *Canadian Global Affairs Institute*, May 2018, 5, https://www.cgai.ca/from_norad_to_nor_a_d_the_future_evolution_of_north_american_defence_co_operation.

⁴⁴¹ Prime Minister of Canada, *Joint Statement from President Donald J. Trump and Prime Minister Justin Trudeau*, 13 February 2017, <https://www.pm.gc.ca/en/news/statements/2017/02/13/joint-statement-president-donald-j-trump-and-prime-minister-justin>; The White House of President Joe Biden, *Roadmap for a Renewed U.S.-Canada*

are high-level policy decisions on which the PJBD may have briefed the Minister of National Defence/Secretary of Defense and Minister of Foreign Affairs/Secretary of State. Although, this too remains unclear as the Roadmap went far beyond defence and security to include such topics as advancing diversity and inclusion. NORAD and USNORTHCOM Commander Van Herck's doctrine (2020-2023) to "deter in competition, deescalate in crisis, and defeat in conflict" was an additional factor contributing to EvoNAD's demise.⁴⁴² It is also unclear what role the PJBD had in communicating EvoNAD's expiration, especially to Canadian decision-makers, or if it was communicated on a service-to-service level.

The PJBD celebrated its 80th birthday on 18 August 2020, with zero acknowledgement from either government. There were few mentions in academia and the media, save a celebration in Washington, D.C. in January 2020 before COVID-19 lockdowns organized by the University of Manitoba's Centre for Defence and Security Studies.⁴⁴³ The Board met for the 239th time, and first since 2019, virtually on 25 June 2021. The reason for not meeting in 2020 was likely due to the COVID-19 pandemic. The new (acting) US co-Chair was Dr. Mara Karlin, then-the Acting Assistant Secretary of Defense for International Security Affairs (ASD/ISA) (now the Assistant Secretary of Defense for Strategies, Plans, and Capabilities) has previous academic experience and

Partnership, 23 February 2021, <https://www.whitehouse.gov/briefing-room/statements-releases/2021/02/23/roadmap-for-a-renewed-u-s-canada-partnership/>. The *Roadmap* highlights a 2+2 Ministerial format dialogue between the Canadian Minister of Global Affairs and National Defence and Secretary of State and Defense to "further coordinate our joint contributions to collective security." As of July 2023, this has yet to happen. This is another reason that the PJBD can flourish, given its ability to discuss the pressing issues with representatives from all these departments, behind closed doors, and expedite the findings to the pertinent decision-makers in both states.

⁴⁴² Glen D. VanHerck, "Deter in Competition, Deescalate in Crisis, and Defeat in Conflict," *JFQ 101*, (2nd Quarter 2021), 4-10, https://www.norad.mil/Portals/68/Documents/jfq/jfq-101/jfq-101_4-10_VanHerck.pdf?ver=vVI2vBwL4HZBV9Sh91ar4w%3D%3D.

⁴⁴³ For literature marking the Board's 80th anniversary, see: Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint?" https://umanitoba.ca/centres/media/The-Permanent-Joint-Board-on-Defence-final-workshop-report_2020.pdf; Lackenbauer, "Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty," <https://www.naadsn.ca/wp-content/uploads/2020/08/20-Aug-Lackenbauer-PJBD-at-Eighty.pdf>;" Charron and Glesby, "After 80 years of advice, joint body's work on North American defence as necessary as ever."

has advised past Secretaries of Defense.⁴⁴⁴ She is also the responsible pen for the recently updated US National Security Strategy under President Biden.⁴⁴⁵ The Honourable John McKay P.C., appointed in 2015 under Trudeau, (a former Toronto lawyer, longtime Liberal MP, and co-Chair of the Diefenbaker-era Canada-United States Inter-Parliamentary Group),⁴⁴⁶ served as the Canadian co-Chair.⁴⁴⁷ The PJBD issued a press release,⁴⁴⁸ stating:

On June 25, 2021, the Acting Assistant Secretary of Defense for International Security Affairs, Dr. Mara Karlin, hosted the 239th meeting of the U.S.-Canada Permanent Joint Board on Defense (PJBD). Started in 1940, the PJBD is a critical forum for U.S.-Canada bilateral defense cooperation, which brings together key leaders to discuss bilateral defense issues and overall defense priorities. Dr. Karlin, the acting U.S. co-chair of the PJBD, and the Honorable John McKay, the Canadian co-chair, convened a virtual meeting of the PJBD to discuss North American Aerospace Defense Command (NORAD) modernization and the benefits of consulting during the development of strategic defense guidance. The PJBD reviewed a framework to guide NORAD modernization efforts to improve capabilities necessary for NORAD to conduct its aerospace and maritime warning and aerospace control missions. The co-chairs reaffirmed the importance of the U.S.-Canada defense relationship and the need to deepen collaboration on areas of mutual defense and security interest.⁴⁴⁹

This press release was a rarity. It is the first public announcement that the PJBD had released. The announcement of Karlin as the acting US co-Chair signals that the US has changed the thinking behind the position. The co-Chair is not just someone who politically supports the Prime Minister or the President and has direct access to them (Biggar or LaGuardia), nor is it

⁴⁴⁴ Government of the United States, “Dr. Mara E. Karlin,” *US Department of Defense*, accessed 22 June 2023, <https://www.defense.gov/About/Biographies/Biography/Article/602723/dr-mara-e-karlin/>.

⁴⁴⁵ Government of the United States, *National Security Strategy*, (Washington, D.C.: The White House of President Joe Biden, 2022), <https://www.whitehouse.gov/wp-content/uploads/2022/10/Biden-Harris-Administrations-National-Security-Strategy-10.2022.pdf>; [Discussion at the 2022 Canadian Defence and Security Network Summer Institute in Ottawa with a US scholar connected to the US Army and DoD.](#)

⁴⁴⁶ Parliament of Canada, “Canada-United States Inter-Parliamentary Group (CEUS).”

⁴⁴⁷ See: Appendix A.

⁴⁴⁸ Press releases announcing the PJBD has met are rare; a press conference was held after a PJBD meeting in Toronto in the 1970s, which was poorly attended, and no other press conferences have been held since. The US Section has the practice of issuing reporting cables via the DoD press contingent to announce the PJBD has met and its agenda after the conclusion of the meeting. See: Charron, “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 8.

⁴⁴⁹ Government of the United States, “U.S.-Canada Permanent Joint Board on Defense Discusses Defense Priorities, NORAD Modernization,” *U.S. Department of Defense*, 25 June 2021, <https://www.defense.gov/News/Releases/Release/Article/2671975/us-canada-permanent-joint-board-on-defense-discusses-defense-priorities-norad-m/>.

someone who had previously served in the armed forces (Hawn or Miller). The co-Chair is a civilian bureaucrat who has the technical knowledge, education, experience, and the ability to make policy via the position of their day job. Indeed, the fact that Karlin was the pen of the Biden US National Security Strategy underlines this direct connection to policy.⁴⁵⁰ There was now an inequality between the chairs – the US had a technocrat and Canada had a politician.

The 240th meeting, and most recent at the time of writing the thesis, was held on 27 October 2022 in Ottawa. Melissa Dalton, the US Assistant Secretary of for Homeland Defense and Hemispheric Affairs (ASD HD/HA) is the permanent Biden co-Chair, assuming Karlin’s acting duties. The Honourable John McKay remains the Canadian co-Chair as of October 2022. The second, public press release reads as follows:

The co-chairs led discussion on North American Aerospace Defense Command (NORAD) modernization, climate change and Arctic security, global and hemispheric security issues, and continued cooperation on key strategic defense guidance efforts. The PJBD reviewed a framework to guide NORAD modernization efforts to improve capabilities necessary for NORAD to conduct its aerospace and maritime warning and aerospace control missions. The co-chairs re-affirmed the importance of the U.S.-Canada defense relationship and the need to deepen collaboration on areas of mutual defense and security interests.⁴⁵¹

Two items in this press release are noteworthy. First, the mention of climate change is new and represents the impact that environmental challenges will have on the defence and security of North America. Melting permafrost will create infrastructure havoc in the Arctic and flooded cities will decrease force and operational readiness, as domestic crises often require the involvement of the Canadian Armed Forces (CAF) or the US Army Corps of Engineers. Second, the use of the term “global and hemispheric issues” speaks to the broad and flexible mandate that the Ogdensburg

⁴⁵⁰ Government of the United States, *National Security Strategy*, (Washington, D.C.: The White House of President Joe Biden, 2022), <https://www.whitehouse.gov/wp-content/uploads/2022/10/Biden-Harris-Administrations-National-Security-Strategy-10.2022.pdf>.

⁴⁵¹ Government of the United States, “Readout of the 240th Meeting of the U.S.-Canada Permanent Joint Board on Defense, *U.S. Department of Defense*, 28 October 2022, <https://www.defense.gov/News/Releases/Release/Article/3203702/readout-of-the-240th-meeting-of-the-us-canada-permanent-joint-board-on-defense/>.

Agreement originally envisioned for the PJBD. Indeed, the PJBD's purview is any issue in the "north half of the western hemisphere."⁴⁵² Given the asymmetry of threats to North America that fall under conventional responses and reside in the "grey zone," this foresight of the original press release could allow the PJBD to continue to meet and discuss a wide variety of interconnected issues in the future.

Two additional items were discussed at the meeting in October 2022. First, a discussion was held regarding the Haitian crisis. Violent gang uprisings, protests over the cost of living, outbreaks of cholera, food scarcity, and a lack of energy and water have placed the country into chaos. The PJBD's broad mandate allowed for a discussion of Haiti especially given that the United States and Canada have both provided military support to the Haitian government in the past, and there has been intense media attention for Canada to do more.⁴⁵³ Given Canada's reluctance to contribute military to Haiti, these delicate, closed-door discussions with no media involvement or outside observers are ideally suited for the PJBD.⁴⁵⁴

Second, the PJBD advised on a "Joint Implementation Plan" relating to NORAD Modernization. The Plan seeks to press acquisition efforts in both states to move forward at greater speed, especially given the \$500 million USD in the 2024 Fiscal Year for Modernization. The goal with the Plan is to draw the attention of senior decision-makers, who hold the purse strings, to make progress via persistent engagement.⁴⁵⁵ Not only does this example show the PJBD still has a role to play in future continental defence planning, but it is actively engaged during this NORAD modernization cycle.

⁴⁵² See Appendix F; Roosevelt, "The Great Communicator."

⁴⁵³ Thomson Reuters, "Canada 'carefully considering' pleas for help from Haiti," *CBC News*, 12 October 2022, <https://www.cbc.ca/news/world/haiti-canada-intervention-1.6613696>.

⁴⁵⁴ A senior official discussed the PJBD's October 2022 meeting with Dr. Charron and me in Fall 2022.

⁴⁵⁵ This information was provided by a senior official discussing the PJBD's October 2022 meeting during the "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023. The event followed the Chatham House rule of non-attribution.

The PJBD has continued to meet in the past thirty years as the geopolitical situation has fluctuated from the Cold War to American unipolarity, and now to Great Power Competition between the United States, Russia, and China. While the number of meetings has been reduced yet again to just annual occurrences, there remains opportunity space for CANUS cooperation on both non-traditional security threats (such as the Y2K bug) and traditional state-level threats (such as new Russian hypersonic capabilities). As the amount of declassified PJBD material since 1991 remains scarce, there are still several topics that may or may not have been discussed by the Board: the 2001 anthrax attacks, Canadian participation in the 2003 Iraq War, assistance for Hurricane Katrina in 2006 and the emerging trend of disaster relief; or, vaccine management during the COVID-19 pandemic, to name a few. This will be public record in due course.

Even so, eighty-three years after the Ogdensburg Agreement, the PJBD continues to provide a forum to discuss complicated issues of combined continental defence planning and attract the attention of pertinent decision-makers via its ability to report directly to the Prime Minister and the President, especially shown by the agenda topics and newly publicized press releases of the meetings. Given that the Board continues to be a venue for invaluable, frank, and private discussion in an era of hyper-partisanship, it should continue to be utilized to find common ground for CANUS defence and security issues.

Chapter 6: Next Steps

6.1: Review of PJBD Activities

In 1940, the Canada-United States Permanent Joint Board on Defence was of essential importance in planning for the defence and security of North America. The Board issued thirty-three recommendations to Prime Minister King and President Roosevelt during WWII. Co-Chairs Biggar (Canadian) and LaGuardia (American) were handpicked by King and Roosevelt for their influence and political connections. The first co-Chairs had direct access to their leaders. Over time, more technically focused organizations were created (the creation of the MCC was even endorsed by the PJBD) and the utility of the PJBD lessened as its meetings and formal recommendations decreased. Still, the Board reinvented itself with a broader agenda (the Ogdensburg Agreement mandated it to consider any issue in the “north half of the Western hemisphere”) and continued to study, advise, and consult on the pressing issues of the day. The PJBD now considers non-traditional defence topics such as electrical grids, computer glitches, Coast Guard cooperation, and cultural impacts of resource development on Inuit in the Arctic.

At different times and for a myriad of different reasons, both governments have held the PJBD in both high regard and indifference—reflecting the priorities and issues of the day, strategic concerns, and geopolitical trends. This can be ascertained from analysis of who is appointed by the Prime Minister and President to the roles of co-Chair, including when the Canadians left the position vacant in 1988 and the Americans in 2009-2011 and 2016-2017.⁴⁵⁶ The academic literature since 1969 has been scant but largely critical of the PJBD, arguing it was no longer relevant and had long ago been supplanted. However, this thesis has compiled the PJBD’s more

⁴⁵⁶ See: Appendix A.

contemporary activity that shows it has continued to provide advice and consult on the pressing defence issues of the day. Today, when needed more than ever given the return of Great Power Competition, the PJBD is meeting far less frequently than it used to – only annually. The Board has become entrenched as part of the machinery of government rather than a forum for trusted advice directly to the Prime Minister and President, as its original intentions necessitated. Even so, the PJBD is only now returning to its defence-focused roots, largely dictated by the cacophony of threats facing the continent.

Borne of the urgency to defend North America during World War II, the PJBD represents the foundation of the CANUS defence relationship that has continually evolved over eighty-three years. Initially, the PJBD made formal recommendations to Prime Minister King and President Roosevelt on such issues as the defence of Newfoundland, the construction of the Alaska Highway, and how to treat German prisoners of war.⁴⁵⁷ After the War's end, the Board initially went through a period of uncertainty as the addition of the MCC, White House National Security Council, and Central Intelligence Agency⁴⁵⁸ were added to the repertoire of advice-providing institutions in the United States. Regardless, in the PJBD's "second golden age" from 1950 to 1953,⁴⁵⁹ as global security concerns dictated increased attention, the Board advised on such issues as: the St. Lawrence Seaway, extension of the Pinetree radar line, and on the command and control structure for NORAD.⁴⁶⁰

After 1953, the PJBD evolved into a largely consultative body that studied and advised, rather than making formal recommendations. The Board advised on issues such as pipelines and

⁴⁵⁷ See: Appendix B and E, PJBD Recommendations 2, 3, 5, 8, 9, 14, 15, 16, 17, 18, 20, 24, 26, and 30.

⁴⁵⁸ Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 5; See: Page 47 of this thesis for further explanation.

⁴⁵⁹ Jockel, *No Boundaries Upstairs*, 124.

⁴⁶⁰ See: Appendix B and E, PJBD Recommendations 48/1, 51/1, 51/2, 51/4, and 53/1.

operational requirements for radar stations, but did not make a formal recommendation until 1964 (it is inferred that the 1964 recommendation concerned US nuclear weapons stationed in Canada). The only study of the PJBD was Beatty's 1969 Ph.D. dissertation, which examines the Board until 1964. In his conclusion, Beatty argued that the PJBD had been supplanted by a multitude of joint institutions (such as NORAD) rendering its agenda thin and significance less.⁴⁶¹ Beatty's conclusion is the precursor for much of the literature that follows him, which discuss the PJBD's "decline"⁴⁶² and "eclipse."⁴⁶³

However, this thesis has compiled material that shows the PJBD continued to serve its consultative role after 1964 and during the Cold War, quietly studying, advising, and facilitating agreements on issues such as: the Anti-Ballistic Missile (ABM) systems Sentinel, Safeguard, and Strategic Defense Initiative (SDI, colloquially known as 'Star Wars');⁴⁶⁴ US Strategic Air Command (SAC)/Aerospace Defense Command (ADCOM) Emergency Dispersal; negotiations over US air bases in Goose Bay and Argentina;⁴⁶⁵ coordinated joint working and steering groups considering the redeployment of AWACS forces for NATO amid reorganization of SAC, Tactical Air Command (TAC), and ADCOM in the United States, and Canadian Forces Air Command;⁴⁶⁶ consulted on the transition and modernization of the Distant Early Warning (DEW) Line into the North Warning System (NWS);⁴⁶⁷ underwater acoustic surveillance systems (SOSUS); subsequent

⁴⁶¹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 310-312.

⁴⁶² Jockel, *No Boundaries Upstairs*, 125.

⁴⁶³ Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 163.

⁴⁶⁴ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 36, 39, 124.

⁴⁶⁵ Lackenbauer, "Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty," 5.

⁴⁶⁶ *Ibid*; Jockel, *Canada in NORAD, 1957-2007*, 93-94.

⁴⁶⁷ Raised in discussions by Dr. Joseph T. Jockel at "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023.

NORAD renewals; and, the PJBD endorsed the North American Air Defence Modernization program to both governments in 1985.⁴⁶⁸

The geopolitical environment changed with the fall of the Soviet Union and end of the Cold War. The United States was the unipolar hegemon and North American defence was no longer a priority for decision-makers. However, the PJBD endured and continued. It did not disappear or fall into dormancy. The Board continued to study and advise on such issues as NORAD's drug interdiction role,⁴⁶⁹ was briefed on the US ballistic missile defence initiative Global Protection Against Limited Strikes (GPALS) in 1992,⁴⁷⁰ was tasked with reviewing "environmental matters related to NORAD operations,"⁴⁷¹ subsequent NORAD renewals, the Y2K computer software bug, and, further study on co-management of the North American power grid after subsequent blackouts in the late 1990s and early 2000s.⁴⁷²

The September 11th, 2001 (9/11) terrorist attacks in New York, Pennsylvania, and Virginia created shocks in existing security arrangements and communities in Canada and the United States. In this new security environment of an asymmetric, non-conventional terrorist threat, the PJBD endorsed and accepted the recommendation of the Bi-National Planning Group (BPG) that NORAD become a multidomain command with the addition of the maritime warning mission;⁴⁷³ ordered the NORAD Next and Evolution of North American Defense (EvoNAD) studies;⁴⁷⁴

⁴⁶⁸ Lackenbauer, "Permanency, Reassurance, and Quiet Diplomacy: The Permanent Joint Board on Defence (PJBD) at Eighty," 4.

⁴⁶⁹ Raised in discussions by Dr. Joseph T. Jockel at "The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration" in Colorado Springs in May 2023.

⁴⁷⁰ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*,

⁴⁷¹ Jockel, *Canada in NORAD, 1957-2007*, 153-154.

⁴⁷² Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 6; Charron and Fergusson, *NORAD: In Perpetuity and Beyond*, 44.

⁴⁷³ Mason, "The Canadian-American North American defence alliance in 2005," 289; Bi-National Planning Group, *The Final Report*, 32-35.

⁴⁷⁴ Charron and Fergusson, "NORAD and the Evolution of North American Defence;" Charron and Fergusson, "From NORAD to NOR[A]D: The Future Evolution of North American Defence Co-operation," 5.

endorsed a “Tri-Command Framework for Arctic Cooperation,” that saw training exercises, analysis, and plans for Arctic operations;⁴⁷⁵ fostered closer Coast Guard cooperation; endorsed the “Beyond the Border” initiative to better secure the shared CANUS border in 2011; coordinated with US Southern Command to interdict drugs coming into North America via the southern avenues of approach;⁴⁷⁶ and, discussed the ongoing Haitian crisis and endorsed a “Joint Implementation Plan” to encourage both governments to move at greater speed to attain acquisitions pertinent to NORAD modernization efforts.⁴⁷⁷

6.2: Success Factors of the PJBD

The future of the PJBD is not a given despite 80 plus years of existence. Its future will be determined by multiple factors. First, the Board provides utility to senior public servants and military command teams. When the PJBD endorses an issue, the public services and military services benefit from its validation when seeking approval from the highest levels of government. The Board also serves as an example of enduring binational cooperation on particular defence and security projects of the day. The PJBD, in the past, was able to gain acceptance at the highest levels of government (the Canadian Prime Minister and President of the United States), which helps to ensure time, resources, and personnel are committed to topics endorsed by the Board. For example, during WWII, the PJBD was instrumental in assisting with the construction of the Alaska Highway at a time when there was considerable Canadian public concern. However, confirmation of the importance by the PJBD and then at the executive level was the needed ‘go ahead’ to assure the roadway’s completion.

⁴⁷⁵ Charron and Fergusson, “NORAD in Perpetuity? Challenges and Opportunities for Canada,” 57.

⁴⁷⁶ Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at “The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation,” 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.

⁴⁷⁷ This information was provided by a senior official discussing the PJBD’s October 2022 meeting during the “The Arctic and Homeland Defense Symposium: NORAD 65th Anniversary Celebration” in Colorado Springs in May 2023. The event followed the Chatham House rule of non-attribution.

Second, the PJBD's tradition of secrecy is of immense value. The Board does not offer media availability and only issues short press releases stating a meeting had taken place on occasion. This means PJBD members can better understand the positions of Canada and the United States in a low-stakes atmosphere. The PJBD's ability to operate with collegiality and privacy allows for a frank discussion of views that is indispensable to better understand the political considerations of the defence issues of the day, especially in an era of hyper-partisanship. While transparency and public access is, indeed, the preferred trend, that there is one place where North American officials can delay and avoid political attention to discuss joint problems and be on the same page can be very helpful. For example, the consequences of an attack on North America, were they to be made public, could create public panic and create a run on the stock markets depending on the scenarios. Nevertheless, they need to be discussed in order for solutions to materialize.

Third, a hallmark of the PJBD is its ability to "cut across bureaucratic obstacles and barriers to senior political authority for action with recommendations."⁴⁷⁸ This is, again, an opportunity for the Board members to have frank, private and sensitive discussions in an era of hyper-partisanship and increased political tension, including within and across services. The PJBD was created via the Ogdensburg Agreement in 1940 as a means to defend North America from existential threats in the Pacific and Atlantic. Arguably those vectors of attack still exist today. That the PJBD can "strive to forge a continental vision unconstrained by bureaucratic stovepipes"⁴⁷⁹ or service rivalries is needed now more than ever. Best exemplified by the horrors of 9/11, the complexity of coordinating binational responses with increasingly larger federal agencies demands that at least

⁴⁷⁸ Fergusson, "Defence and Security in the Arctic."

⁴⁷⁹ Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 6.

one board without ties to these agencies can ask pointed questions and confirm the collective need for particular action, even if it means that one agency or service will bear the brunt of the cost or work.

Fourth, the PJBD has interpreted the term “advice” broadly. Rather than simply formal recommendations (of which there have been many), the Board has also served to test, validate, refute, confirm, question, consult, act as a sounding board, and simply listen to ideas and concerns. The PJBD has not been driven by the requirement to evaluate its performance by metrics of number of recommendations or decisions made. Rather, it serves the purpose needed at the time based on the issue. This is re-emphasized by its changing role after WWII, where the PJBD transitioned into a ‘consultative’ role to study and advise, rather than only providing formal, written recommendations. Evaluating the Board’s role in continental defence planning only by its issuance of recommendations does not consider its wide ability to play other roles and functions.

Fifth, Great Power Competition throughout history can mean conflicts can escalate quickly. The West has seen a return to this competition since 2014 and Russia’s annexation of Crimea, Ukraine. Closer coordination and integration between Canada and the United States, especially relative to NORAD, various modernization projects, and for continental defence writ large, is more important than it has been in decades. The geopolitical situation of today is reminiscent of Beatty’s 1969 analysis of the 1949 international security environment that sparked renewed PJBD activity: the Soviet Union’s development of nuclear weapons is comparable to Russian hypersonics rendering North American defences outdated; the coup of Chiang Kai-shek by the Chinese Communist Party can be compared to rising global authoritarianism; and, the Korean War is comparable to Russia’s invasion of Ukraine in the sense that the United States is actively

supporting, arming, and training the Ukrainians in a proxy conflict to support their security interests.

Sixth, the PJBD has shown ability to expand and to change its agenda. From support of the St. Lawrence Seaway and Power Project, to expanded government machinery after 9/11, or joint concerns about instability in Haiti, the PJBD is not constrained to classic defence issues only. This flexibility is especially important given the blurring of defence and security issues in a contemporary context. For example, the effect of climate change on infrastructure is a likely future topic given shared North American electricity grids, railway networks, and pipelines.

Finally, longevity provides a momentum on its own. Even when PJBD co-Chairs were not appointed and the frequency of meetings went down, the PJBD still endured. It is likely a combination of institutional momentum, that support of the PJBD is not very costly and that, if even a modicum of help to one or both sides, it is worth preserving. Despite the announcement of a new policy-making format, the Ministerial 2+2, has met only once.⁴⁸⁰ Rather than requiring Defence/Defense and State/Global Affairs Ministers and Secretaries to meet, the PJBD's flexible participants' format where government representatives may attend relative to the issue of the day (for example, public health officials during COVID-19), allows for agility the limited membership the 2+2 does not provide.

6.3: Criticisms and Weaknesses of the PJBD

The PJBD is not without criticism and weaknesses. Based on the analysis of its history and agenda, four issues are consistently noted. First, existing institutions and organizations, such as the MCC, NORAD, service-to-service relationships, and other bilateral arrangements have

⁴⁸⁰ Government of the United States, "Press Availability at the U.S.-Canada 2+2 Ministerial," *U.S. Embassy & Consulates in Canada*, 14 December 2018, <https://ca.usembassy.gov/press-availability-at-the-u-s-canada-22-ministerial/>.

considerably thinned out the Board's agenda. As issues now rely more heavily on technical solutions that require practitioner input, the PJBD has had less to discuss. On the other hand, the Board can still operate as a check and balance via its function of studying and advising – for example, after 9/11, the BPG recommended NORAD could become a multi-domain command. The PJBD concurred with concerns of the military services and endorsed a maritime warning function for NORAD only. As the Board has a mix of military and civilian membership, it can act as a “sober second thought” to determine the urgency and priority of fewer, but specific, issues to expedite them for action appropriately. This also helps to avoid an “echo chamber” thinking phenomenon among the PJBD membership.

Second, Jockel, based on his role as the US Acting PJBD Secretary in 1984-1985, pejoratively referred to the Board as the “Permanent Joint Boondoggle,” where nothing of use is discussed (and that such discussions could be achieved in another forum or institution, such as the MCC, service-to-service discussions, ADMPol-OSD(P) discussions, or NORAD). The PJBD has no metrics of success or evaluations, other than for the co-Chairs who serves at the pleasure of the Prime Minister or the President – a measure of “success” of sorts depending on their duration in the role and what position they are in after their PJBD tenure ends (essentially, are they promoted or demoted or retained even with a change in government?). There is no incentive for the Board and its co-Chairs, therefore, to be overly ambitious or to wrestle with difficult and complex issues. During Jockel's tenure, the Board served largely as a talking shop, with little purpose beyond providing the sections with all-expenses paid trip to destinations outside the capitals. Jockel further says that the symbolism and legacy of King, Roosevelt, and LaGuardia only loom over academic analysis of the PJBD, but is not realized at meetings. Jockel's criticism is noted, respected, and worth consideration. It might, however, reflect the time period in which he served when fewer

urgent defence issues required new, binational solutions (the major binational defence project of the 1980s, the NWS, had already been endorsed by the PJBD by the time Jockel arrived). A senior PJBD official told a conference delegation in 2020 that contemporary PJBD members are aware of the legacy and importance of the Ogdensburg Agreement and compared the new international security dynamics of today to those of the 1940s, when North American security concerns were at a peak.

Third, the success of the PJBD presupposes that the co-Chairs have close relationships with the Prime Minister or President, hold influence (such as Biggar and King's relationship), or are political supporters (such as LaGuardia and Roosevelt). Since 1975 and President Ford's appointment of Charles S. Gubser, the US co-Chairs can be split into three categories: career public servants (Peters, Mason, Karlin, Dalton); former Congressional representatives (Gubser, Morgan, Rousselot, Nethercutt, Spratt); or, representatives with military (Miller) or legal backgrounds (David).⁴⁸¹ On the Canadian side, the PJBD co-Chairs have been elected officials since John Black Aird was appointed in 1971. Having no insight into the secret conversations, it is difficult to ascertain the level of closeness between the executive and his or her co-Chair. It is inferred that reports and discussions between the co-Chairs and the executives are likely not nearly as close, candid, solicited, or frequent as in the early days when co-Chairs had ready access because they were handpicked confidants. There is also a mismatch when US co-Chairs are technical experts (e.g. Miller) versus elected Canadian chairs (e.g. McKay), who might have an extreme interest in defence and security but rarely do they have direct experience with the issues at hand. Of course, a return to the very early days of the PJBD with learned and highly decorated civilian luminaries like a LaGuardia or Acheson could be a possibility, but highly unlikely given the growing

⁴⁸¹ See: Appendix A.

polarization and partisanship of all appointments. Certainly, the Right Honourable David Johnston's vilification after delivering his recommendation to the Trudeau government in 2023 as special rapporteur investigating allegations of Chinese electoral in the 2019 and 2021 Canadian federal elections would give any civilian pause.⁴⁸² How can one be both a confidante of the Prime Minister and be seen to be objective? Of course, Johnston's appointment was very public but it is likely to be a warning to others asked to serve Heads of State in the future. Likewise, appointees of Heads of States may be tarnished by the reputation of their leaders (for example, given Trump's numerous legal troubles, all of his former appointees to various boards must be concerned about their reputations by association).

Finally, it is difficult to know the impact PJBD advice really has. Very few people know of the Board's existence and therefore do not know to seek its advice or review its recommendations. It is simply up to the Prime Minister and President to approve the recommendation, decline action, send it back to the PJBD, or send it to the proper Minister or Secretary for further action with no feedback loop or review of action taken to know if the advice was timely, relevant and appropriate.

6.4: Potential New Topics

In June 2023, during the height of the Canadian wildfire season, Public Safety and Emergency Preparedness Canada (PSEPC) Minister Bill Blair discussed a "NORAD-like approach" to binational disaster response and relief with the United States and the US Federal Emergency Management Agency (FEMA).⁴⁸³ As climate change exacerbates natural emergencies and puts further strain on an overstretched Canadian military, closer coordination between Canada

⁴⁸² Darren Major, "David Johnston resigning as special rapporteur on foreign interference," *CBC News*, 9 June 2023, <https://www.cbc.ca/news/politics/david-johnston-resigns-1.6871761>.

⁴⁸³ Christian Paas-Lang and Catherine Cullen, "U.S., Canada open to a 'NORAD-like' model of joint disaster response: Blair," *CBC News*, 9 June 2023, <https://www.cbc.ca/news/politics/canada-us-disaster-response-cooperation-1.6871059>.

and the United States on this issue could be arranged through the PJBD (or the PJBD could serve as a model) that has equal composition of its Board (co-Chairs from both governments), includes federal and provincial/state-level officials to study, advise, and report to the respective Ministers/Secretaries. Additionally, the PJBD also provides a case study for future research in Western-thinking states, such as South Korea and Japan or Australia and New Zealand, who are neighbours with shared economic, cultural, and geographic ties that face a mutual security threat.

Other emerging North American security issues, such as artificial intelligence and autonomous weapons, domestic extremism, mass migration due to climate change or authoritarian regimes, resource development in the Arctic, public health, and Chinese military aggression in Southeast Asia with a North American nexus could be considered by the PJBD. Given its broad mandate of looking at any issue affecting the “north half of the western hemisphere,” and flexible composition of equal membership (agencies and services relative to the meeting agenda of the day), the Board’s design allows itself to adapt to discuss any issue the Canadian and US sections deem worthy of its advice. More frequent meetings in the future may be necessary given the complexity, range, and scale of these other security concerns. The United States is already viewing the international security environment as dire enough to re-establish the 1941 Lend-Lease Agreement as the Ukraine Democracy Defense Lend-Lease Act of 2022.⁴⁸⁴ As history is beginning to echo, the reestablishment of WWII-era policies supports more frequent use of the PJBD to help solve the pressing defence challenges of this generation.

⁴⁸⁴ 117th Congress of the United States, “Ukraine Democracy Defense Lend-Lease Act of 2022,” 9 May 2022, <https://www.govinfo.gov/content/pkg/BILLS-117s3522es/pdf/BILLS-117s3522es.pdf>.

6.5: Potential New Structure

In 1938, Canada's strategy was to obtain "knowledge of, access to, and opportunities to influence US thinking and plans for North American defence."⁴⁸⁵ Canada should continue to prioritize the CANUS relationship to the highest degree, and that includes an internal discussion on the role of the Canadian co-Chair. The role of the US Assistant Secretary has been compared to the prestige and influence that a Canadian MP has within the Canadian parliamentary system.⁴⁸⁶ However, given that the current US co-Chair (Dalton) is a technocrat with knowledge experience, and the Canadian co-Chair (McKay) is a politician who does not sit in Cabinet (although has been in the co-Chair role for seven years at the time of writing this thesis), there seems to be a disconnect between how Washington and Ottawa view the role of the PJBD co-Chairs in a contemporary context. By having an equilibrium and matching the US's understanding of the co-Chair position (political appointment or technocrat), this is a possible avenue for Canada to reinforce the 1938 strategy by increasing the opportunity to influence US thinking by having an equally knowledgeable person sit in the meetings. The Canadian equivalent to the US Assistant Secretary of Homeland Defense and Hemispheric Affairs would come from the ADMPol Continental Defence Policy directorate.

There is also the question of why the PJBD is only a board for Canada and the United States and does not include Mexico. On the one hand, the Canada-US-Mexico Free Trade Agreement is one of the largest and economically consequential in the world, and at the same time, Mexico is excluded from NORAD, the shared border agreements, and from NATO. Given how dependent the three states are on each other for supply chain issues, trade, and economic success,

⁴⁸⁵ Fergusson, *Canada and Ballistic Missile Defence, 1959-2009*, 122.

⁴⁸⁶ Raised in discussions by The Honourable Mr. Laurie Daniel Hawn at "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 17 January 2020, *Centre for Defence and Security Studies* at Johns Hopkins University School of Advanced International Studies in Washington, D.C.

should Mexico not be at the table? Of course, Canada has jealously guarded its special relationship with the United States, and the defence and security issues Canada has with the United States are not the same as those with the United States and Mexico. However, with climate change, globalization and shared vulnerability given critical infrastructure, perhaps the time has come to rethink fundamentally about the states represented.

6.6: Policy Recommendations and Conclusion

Renewed Great Power Competition between the United States, Russia, and China requires further cooperation, and coordination, and integration in the wide-ranging Canada-US defence and security relationship. The geopolitical conditions of today have piqued political and public attention and focus on continental defence. The positives of what the PJBD has to offer far outweigh the negatives. The negatives can be fixed by further education, structural changes, or administrative tweaks. The following policy recommendations are gleaned from the literature to help address the PJBD's criticism and weaknesses.

First, as PJBD membership is both civilian and military, it provides a more holistic representation of advice than solely military institutions (such as the MCC, NORAD, service-to-service relationships) and other bilateral arrangements (such as the ADMPol-OSD(P) relationship) can provide. It also reflects the blurring of threats that can rarely be classified as just a defence or just a security concern, and the fact that defence and civilian agencies share information. Additionally, because of the diverse perspective of experience, ideas, and mandates, this assists in avoiding groupthink and can better determine the priority of a particular defence issue for consideration by the Prime Minister and President. This array of perspectives and viewpoints is a reason for the respective governments to call upon and utilize the PJBD more often, to handle and discuss wide-ranging, difficult, complex, and pertinent issues that need timely and sound advice.

Big and challenging issues can be talked about in PJBD meetings without the fear of reprisal or commitment.

Second, the criticism that the PJBD is simply a “talking shop” would be partially rectified with increased availability of the Board’s record of actions (at least within the confines of declassification protocols in both Canada and the United States) which provide a measure of accountability. Limited academic analysis has largely relied on material that is: either spread to a select few as proxy of their service or government positions; second-hand by word-of-mouth by those in the know and are speaking under non-attribution; or, by arduous and specific requests for information that is often already decades old. The majority of readily accessible information available on the PJBD is from before 1964. A simple “fast facts” sheet and timeline of general advice decisions would be invaluable to future researchers and is something that could easily facilitated and coordinated by Global Affairs and the State Department. The PJBD does not have to publicize much to re-make its now-incorrect image of an institution past its prime. Given most of the foundational literature (highlighted in Chapter 2.2) does not concern itself with anything after 1964, this is a simple solution to increase its reputation as a viable advice provider among the scholarly community, if not the public writ large.

Third, a hallmark of the PJBD’s past was the ability for the co-Chairs to have the ear of the Prime Minister and the President (the most famous example of this is LaGuardia and Roosevelt). This allowed the co-Chairs to have ready access and bring urgent defence issues directly to the executive’s attention, bypassing normal bureaucratic procedures and reporting chains – gravely important when time is of the essence in crisis or war. Today, the co-Chairs do not have a direct line to the executive as the Canadian co-Chair is a backbencher MP and the American co-Chair is an Under Secretary of Defense (although does have a direct line to the Secretary of Defense).

Whether this is by design is unknown and the thinking behind choosing co-Chairs who do not have quick access to the executive goes back to at least the 1960s. Given the complexity of current threats to North America, the co-Chairs, at the very least, need to be entrusted directly by the Minister of National Defence/Secretary of Defense so that when an urgent situation does arrive, the PJBD's advice is not arriving in a letter (that may be too late), but rather a face-to-face conversation or telephone call that reflects urgency and appropriately expedites the situation at hand.

Fourth, the PJBD's secrecy is both a blessing and a curse. Publicizing the Board's meetings goes against its founding values as a body for frank and private discussions so that members can better understand unique American and Canadian policy positions and work together to find consensus. To raise the PJBD's profile as a viable and useful forum in the Canadian and American defence and security establishment and practitioner communities would be a delicate balancing act. The Board could begin the practice of issuing a joint communiqué of topics discussed and update its current membership after every annual meeting. Even the secret-US Defense Policy Board (which, presumably, only discusses US defence issues), issues a topic list and regularly updates its membership.⁴⁸⁷ The International Joint Commission (which influenced King's thinking behind the Ogdensburg Agreement in 1940) can serve as a model for an even greater public presence – even inviting public input. This recommendation serves the need for greater public output, while respecting the vital secret discussions that are key to the PJBD's success.⁴⁸⁸

⁴⁸⁷ Government of the United States, "Defense Policy Board," *Under Secretary of Defense for Policy*, last accessed 11 July 2023, <https://policy.defense.gov/OUSDP-Offices/Defense-Policy-Board/#:~:text=Mission%3A%20The%20Board%2C%20through%20the,Defense%2C%20the%20Deputy%20Secretary%20of>.

⁴⁸⁸ It is noteworthy that the thinking behind the second and fourth policy recommendations are different. The second recommendation serves the academic community, that would immensely benefit from greater access to records, so that the critical narrative of the PJBD can be updated to reflect newer information. The fourth recommendations to benefits the practitioner communities who may be unaware of the Board's very existence and could find it useful for future integration, cooperation, and coordination of CANUS defence relations.

There is also inherent value in keeping the PJBD as a secret forum and for both governments to not publicize its meetings with press conferences or media availability. A handful of officials in both countries that have varying connections to the Board have made off-hand remarks at various events recently that the PJBD needs to be publicized in order to effectively communicate the defence and security threats of the day to Canadians and Americans who may be unaware. While there is something to be said for creating the chances for Canadians, in particular, to be more interested in defence issues, the PJBD is not the venue to communicate this to the Canadian and American publics. Its secrecy is paramount for operating in a manner conducive to providing reliable advice. However, a communiqué of topics discussed could help to highlight the role and importance of the Board to the wider practitioner communities and provide opportunities to highlight the importance of defence issues in other fora and venues for the public.

Fifth, there is an opportunity for senior decision-makers to consider the PJBD as a venue for important background discussions on defence and security issues when the Prime Minister and President do not get along (such as Diefenbaker and Kennedy or Trudeau and Trump). This recommendation assumes that the co-Chairs have the respect of the executive so that discussions are accurately and expediently reported, no matter the results of the discussions buffering potential and direct heads of state personality clashes. Increasing the PJBD's utility in this scenario would allow for disagreements to be negotiated via trusted advisors and policy experts in private, limiting collateral damage to the binational relationship writ large. This recommendation is advantageous for both governments.

The Canada-United States Permanent Joint Board on Defence has provided advice on defence issues to the highest levels of each government for eighty-three years. It continues to meet annually with representatives from the services and government agencies. Given the current

geopolitical threat environment and its legacy of advice outcomes on pertinent defence issues of the day, the PJBD has a viable role in continued coordination of CANUS defence relations. The five policy recommendations explained above could increase the Board's ability to provide timely and relevant advice during the current era of Great Power Competition and continental defence modernization, as it did when it was most active in helping to defend North America pre and post-WWII.

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* Table prepared by Roman Ellis in 2019, with assistance from Hon. Mr. McKay P.C. Provided to Nicholas Glesby by Dr. Andrea Charron and updated in 2023.

Appendix A

| Co-Chairs of the Canada-US Permanent Joint Board on Defence <i>*N.B. Dates in brackets [] are assumed.</i> | | |
|---------------------------------------------------------------------------------------------------------------|--------------------------------------------|-----------------------------------------------|
| YEAR | U.S. CO-CHAIR | CANADIAN CO-CHAIR |
| 1940 | F.H. LaGuardia ⁴⁸⁹ 1940-1947 | O.M. Biggar ⁴⁹⁰ 1940-1945 |
| 1941 | | |
| 1942 | | |
| 1943 | | |
| 1944 | | |
| 1945 | | |
| 1946 | | |
| 1947 | | |
| 1948 | Dean Acheson ⁴⁹² 1947-1948 | A.G.L. McNaughton ⁴⁹¹ 1945-1959 |
| 1949 | Guy V. Henry ⁴⁹³ 1948-1954 | |
| 1950 | | |
| 1951 | | |

⁴⁸⁹ Department of National Defence Directorate of History, *A Brief History of the Canada-United States Permanent Joint Board on Defence, 1940-1960*, (Ottawa: The Queen's Printer, 1960), p. 5.

⁴⁹⁰ Ibid., 4.

⁴⁹¹ Ibid., 7.

⁴⁹² Ibid., 6.

⁴⁹³ Ibid., 9.

| | | |
|------|-----------------------------------------------------|--|
| 1952 | | |
| 1953 | | |
| 1954 | | |
| 1955 | John. A. Hannah ⁴⁹⁴ 1954-1963 | |
| 1956 | | |
| 1957 | | |
| 1958 | | |
| 1959 | | |
| 1960 | | |
| 1961 | | |
| 1962 | | |
| 1963 | Hon H. Freeman Matthews ⁴⁹⁶ 1963-1969 | |
| 1964 | | |
| 1965 | | |
| 1966 | | |
| 1967 | | |

⁴⁹⁴ *Ibid.*, 11; Department of Foreign Affairs, Trade and Development Canada, “Secret: Ottawa, September 17, 1962,” in Chapter III - The United States, Part 2 – Defence and Security Issues, *The Department in History: Documents on Canadian External Relations*, Vol. 29: 1962-1963, 2013; David G. Haglund and Joel J. Sokolsky, *The U.S.-Canada Security Relationship: The Politics, Strategy and Technology of Defense* (Routledge, 2019): Phase 5.

⁴⁹⁵ *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 13.; Greg Donaghy, *Tolerant Allies : Canada and the United States, 1963-1968*, McGill-Queen's University Press, Montreal, 2002, p. 118.

⁴⁹⁶ “H. Freeman Matthews, Diplomat since 1920’s: Obituary,” *New York Times*, 21 October 1986; *H. Freeman Matthews Sr. Papers*, Philadelphia Area Archives Research Portal.

| | | |
|------|------------------------------------------------|------------------------------------------------------------|
| 1968 | | Arnold Danforth Patrick Heeney ⁴⁹⁷ 1967-1970 |
| 1969 | | |
| 1970 | Andy Leroy Borg ⁴⁹⁸ 1969-1975 | John Black Aird ⁴⁹⁹ 1971-1979 |
| 1971 | | |
| 1972 | | |
| 1973 | | |
| 1974 | | |
| 1975 | | |
| 1976 | | |
| 1977 | | |
| 1978 | Charles S. Gubser ⁵⁰⁰ 1975-1978 | |
| 1979 | | |
| 1980 | | |
| 1981 | Thomas E. Morgan ⁵⁰¹ 1978-[1981] | |

⁴⁹⁷ “A. D. P. Heeney: Diplomat headed IJC and civil service body,” *Globe and Mail* [Toronto], 21 December 1970; 1. P.C. 1971-2222.

⁴⁹⁸ Richard M. Nixon, “Appendix A: October 31, 1969,” *Public Papers of the Presidents of the United States: Richard M. Nixon, 1969*, 1971, p. 1077; Gerald R. Ford Presidential Library, “Gubser, Charles S.,” published May 13, 1975, <https://www.fordlibrarymuseum.gov/library/document/0248/whpr19750513-007.pdf>.

⁴⁹⁹ P.C. 1971-2222; Cabinet Conclusions, “Appointment - Chairman, Canadian section, Canada-United States Permanent Joint Board on Defence,” Library and Archives Canada, RG2, Privy Council Office, Series A-5-a, Volume 6381 Access Code: 90, 21 October 1971.; *Canada Gazette, Part I*, Vol. 113, No. 44, 3 November 1979, p. 6770.

⁵⁰⁰ “Nominations & Appointments, October 20, 1981,” Ronald Reagan Presidential Library, National Archives and Records Administration.

⁵⁰¹ *Public Papers of the Presidents of the United States: Jimmy Carter, 1978, Book 1-January 1 to June 30, 1978*, 1979, p. 453.

| | | |
|------|-------------------------------------------------|--------------------------------------------------|
| 1982 | Charles S. Gubser ⁵⁰⁴ 1981-1985 | George Hees ⁵⁰² 1979-1984 |
| 1983 | | & |
| 1984 | | Jack Sydney George Cullen ⁵⁰³ 1984 |
| 1985 | John H. Rousselot ⁵⁰⁶ 1985-1988 | Allan Lawrence ⁵⁰⁵ 1984-1987 |
| 1986 | | |
| 1987 | | |
| 1988 | | [VACANT] [1988] |
| 1989 | Fred Jones Hall ⁵⁰⁷ [1988]-[1993] | Patrick Crofton ⁵⁰⁸ 1989-1995 |
| 1990 | | |
| 1991 | | |
| 1992 | | |
| 1993 | | |
| 1994 | Mary Ann Peters ⁵⁰⁹ 1993-1994 | |

⁵⁰⁴ “Nominations & Appointments, October 20, 1981,” Ronald Reagan Presidential Library, National Archives and Records Administration.

⁵⁰² *Canada Gazette, Part I*, Vol. 113, No. 44, 3 November 1979, p. 6770.; *Canada Gazette, Part I*, Vol. 118, No. 11, 17 March 1984, p. 2224.

⁵⁰³ *Canada Gazette, Part I*, Vol. 118, No. 11, 17 March 1984, p. 2224.; *Canada Gazette, Part I*, Vol. 119, No. 1, 5 January 1985, p. 65.

⁵⁰⁵ 1. *Canada Gazette, Part I*, Vol. 118, No. 11, 17 March 1984, p. 2224.; Ibbotson, Doug, “MP Allan Lawrence says he’ll be quitting after 30 years in politics,” *Toronto Star*, 27 October 1987.

⁵⁰⁶ “Nominations & Appointments, November 22, 1985,” Ronald Reagan Presidential Library, National Archives and Records Administration; L.A. Times, *John Rousselot: 75; Congressman of 14 Years, John Birch Society Official*, published May 12, 2003, <https://www.latimes.com/archives/la-xpm-2003-may-12-me-rousselot12-story.html>.

⁵⁰⁷ Allan Cromley, “Shultz Gives Sooner Brief Lesson City Man Adapts to Role in State Department,” *Sunday Oklahoman*, 28 February 1988.

⁵⁰⁸ “Veterans health-care system upgraded,” *Toronto Star*, 3 March 1989; P.C. 1989-0356; P.C. 1995-0457.

⁵⁰⁹ Deanna Congileo, “Carter center appoints new chief executive officer,” Emory University, 1 April 2014.

| | | |
|------|------------------------------------------------------|---------------------------------------------------|
| 1995 | Dwight N. Mason ⁵¹⁰ 1994-2002 | Jesse Philip Flis ⁵¹¹ 1995-1998 |
| 1996 | | |
| 1997 | | |
| 1998 | | |
| 1999 | | |
| 2000 | | |
| 2001 | | |
| 2002 | Jack David ⁵¹³ 2002-2005 | Jacques Saada ⁵¹² 1998-2004 |
| 2003 | | |
| 2004 | | |
| 2005 | | |
| 2006 | George R. Nethercutt Jr. ⁵¹⁵ 2005-2009 | Judi Longfield ⁵¹⁴ 2004-2006 |
| 2007 | | Hon. Rick Casson P.C. ⁵¹⁶ 2006-2011 |
| 2008 | | |

⁵¹⁰ House of Commons, Standing Committee on Foreign Affairs and International Trade, *Partners in North America: Advancing Canada's Relations with the United States and Mexico*, December 2002, p. 113.; Dwight Mason, email to Andrea Charron, 18 January 2020.

⁵¹¹ P.C. 1995-0457.; Kittelberg, Lori, "PM Names Saada to Canada-US Security Post," *The Hill Times* [Ottawa], 14 September 1998; P.C. 1998-1557.

⁵¹² Lori Kittelberg, "PM Names Saada to Canada-US Security Post," *The Hill Times* [Ottawa], 14 September 1998; P.C. 2004-0463.

⁵¹³ The White House, Office of the Press Secretary, "Nominations & Appointments," 1 March 2002.; Dwight Mason, email to Andrea Charron, 18 January 2020.

⁵¹⁴ P.C. 2004-0463.; P.C. 2006-0472.

⁵¹⁵ The White House, Office of the Press Secretary, "Personnel announcement," 8 April 2005; "Unreported Cases," *Delaware Journal of Corporate Law*, Vol. 37, No. 3, 2013, p. 1056.

⁵¹⁶ P.C. 2006-0472.; P.C. 2011-0607.

| | | |
|------|-------------------------------------------------------------------|-----------------------------------------------------|
| 2009 | | |
| 2010 | VACANT ⁵¹⁷ 2009-2011 | |
| 2011 | | |
| 2012 | John M. Spratt Jr. ⁵¹⁸ 2011-[2016] | Hon. Laurie Daniel Hawn ⁵¹⁹ 2011-2015 |
| 2013 | | |
| 2014 | | |
| 2015 | | |
| 2016 | | |
| 2017 | VACANT ⁵²¹ 2016-2017 | Hon. John McKay P.C. ⁵²⁰ 2016-Present |
| 2018 | Lt Gen (ret) Christopher D. Miller ⁵²² 2018-Present | |
| 2019 | | |
| 2020 | | |
| 2021 | Dr. Mara Karlin (Acting) ⁵²³ | |
| | | |

⁵¹⁷ David T. Jones, “US-Canada Security,” *International Journal*, Vol. 66, No. 2, 2011, p. 457.

⁵¹⁸ The White House, Office of the Press Secretary, “President Obama Announces More Key Administration Posts,” 16 September 2011

⁵¹⁹ P.C. 2011-0607.; Canada, “Governor in Council Appointments” [archived on 29 July 2015].

⁵²⁰ Canada, “Organization Profile - Canada-US Permanent Joint Board on Defence,” 6 March 2017; P.C. 2016-0752.

⁵²¹ “President Donald J. Trump Announces Intent to Nominate and Appoint Personnel to Key Administration Posts,” *Federal Information & News Dispatch* [Washington, D.C.], 27 March 2018.

⁵²² Ibid.

⁵²³ President Trump was defeated by President Biden in November 2020. Dr. Karlin was appointed the acting U.S. co-chair of the PJBD for the 239th meeting on 25 June 2021. See: <https://www.defense.gov/News/Releases/Release/Article/2671975/us-canada-permanent-joint-board-on-defense-discusses-defense-priorities-norad-m/>.

| | | |
|------|-------------------------------|--|
| 2022 | Melissa Dalton ⁵²⁴ | |
| 2023 | | |

⁵²⁴ Dalton was appointed as the permanent Biden co-Chair in 2022. See: Government at United States, “Readout of the 240th Meeting of the U.S.-Canada Permanent Joint Board on Defense,” *U.S. Department of Defense*, 28 October 2022, <https://www.defense.gov/News/Releases/Release/Article/3203702/readout-of-the-240th-meeting-of-the-us-canada-permanent-joint-board-on-defense/>.

*Thank you to Maria-Otilia Nagy for transcribing PJBD Recommendations 1-33. Please note that PJBD Recommendations 34 to 50 are original work that have been pieced together using secondary literature.

Appendix B

Recommendations of the Canada-U.S. Permanent Joint Board on Defence, 26 August 1940 - 1964⁵²⁵

PJBD Recommendation 1, 26 August 1940

Exchange of Information:

It was agreed that there should be a full and complete exchange of military, air and naval information between the two Sections of the Board, with the understanding that each Section would be free to convey to its government any information they received.

Action by U.S. Government: There appears to be no specific evidence in the files of the U.S. Section of approving or disapproving action. However, in the Progress Reports annexed to the Journal of Discussions and Decisions for the 20 21 January 1941 and subsequent meetings, members of the U.S. Section of the Board reported on the progress of action under this recommendation. It is apparent that at least informal approval was implied, or that approval had been taken for granted. This lack of evidence may be accounted for by the fact that the board at its early meetings attacked a large number of substantive problems without concerning itself adequately with procedural and administrative problems.

Action by Canadian Government: Approved, 5 September 1940

PJBD Recommendation 2, 27 August 1940

Defence of Newfoundland

- A. The Island of Newfoundland occupies a commanding position at the entrance of the St. Lawrence-Great Lakes waterway and on the flank of the sea route between the Atlantic seaboard of North America and Northern Europe. It is on the direct air route between the East Coast of the United States and Northern Europe. It is the point in North America, nearest to Europe, from which, if occupied by an enemy, further operations against the North American continent might be effectively initiated. As such it should be adequately defended.
- B. The forces in Newfoundland now consist of one battalion of infantry for the defence of Botwood and the Newfoundland airport, a battery of two 4.7-inch guns now being installed at Bell Island, and a flight of five Digby (Douglas) land planes operating from Newfoundland

⁵²⁵ For a full description of the thirty-three wartime recommendations, see: Dziuban, *Military Relations Between the United States and Canada, 1939-1945*, Appendix A, 347-365, https://history.army.mil/html/books/011/11-5/CMH_Pub_11-5.pdf; For a condensed version of the recommendations, see: Stacey, "The Canadian-American Permanent Joint Board on Defence, 1940-1945," 122-124.

airport. These forces are considered inadequate for the defence of the island at the present time and the security of Canada and the United States is thereby endangered.

- C. The Board considers that the defence of Newfoundland should be materially strengthened by:
- (a) Increasing the strength of the Canadian defensive garrisons immediately;
 - (b) Establishing as soon as practicable, and not later than the spring of 1941, a force of aircraft of suitable types adequate for patrolling the seaward approaches to Newfoundland and Canada and for the local defence of the Botwood area;
 - (c) Selecting and preparing, as soon as practicable, bases permitting the operation of United States aircraft, when and if circumstances require, in numbers as follows:
 - (1) A minimum of four squadrons of patrol planes (48 planes).
 - (2) A minimum of one composite group of land planes (73 planes).
 - (d) Completing, as early as practicable, and not later than the spring of 1941, the installation of appropriate defence for the port of St. John's, Newfoundland, for Botwood, and for other points as required.
 - (e) Taking such additional measures as further examination of the defence problem and local reconnaissance show to be necessary.

Action by U.S. Government: See comment on First Recommendation. Insofar as portions of the first eight recommendations related to troop and matériel dispositions which had not been made by 2 October 1940, they were approved as a result of their incorporation in the First Report of the Board to the two governments. This report, reproduced at Appendix B, received formal approval on 19 November 1940. Apparently, because of this action, the 12 December 1951 List arbitrarily assigns that date as the date of United States approval of the first eight recommendations. Such an assignment is not entirely accurate since the First Report encompassed only limited portions of the first eight recommendations.

Action by Canadian Government: Approved, 5 September 1940.

PJBD Recommendation 3, 27 August 1940

Defence of Newfoundland

- A. The strategic importance of the Maritime Provinces is similar to that of Newfoundland. However, in addition to providing bases for the operation of aircraft and light patrol craft, the Maritime Provinces must provide secure bases from which major naval operations can be projected.
- B. This will require harbors secure from underwater attack, with docking, repair and supply facilities capable of accommodating the major portion of the United States or British fleets; operating facilities for military and naval air forces; and harbor defences supported by the necessary troop concentrations.
- C. The Board finds that some of these requirements have already been met and that steps have been initiated for the accomplishment of others.

- D. It is apparent that the following should be undertaken by the Canadian Government:
- (a) Early completion of the present projects for underwater defences at Halifax, Sydney, Gaspé and Shelburne.
- E. The Board also recommends the preparation in Canada and in the United States of adequate strategic reserves of men and materials for timely concentration in the Maritime Provinces if, and when, the need arises.

Action by U.S. Government: See comments on First and Second Recommendations. Portions of this recommendation were included in the First Report.

Action by Canadian Government: Approved, 5 September 1940.

PJBD Recommendation 4, 27 August 1940

Allotment of Materials

It was agreed that arrangements concerted between the United States and Canadian representatives of each Service with regard to this material should be passed through the proper channels in order that the proper allocation of the material should be promptly made. It was further agreed that material provided to implement the recommendations of the Board shall not be used for any other purposes. As at present advised, the Board regarded the following classes of material as of special importance, their relative importance being in the order indicated for each Service:

Ground Forces

- (a) A.A. armament and ammunition.
- (b) Harbor defence armament and ammunition.
- (c) General equipment of mobile defence.

Air Force

- (a) Patrol planes.
- (b) Fighter or pursuit planes with, in each case, armament, ammunition and radio equipment.

As to the Naval Forces the position as reported was that there have already been discussions which have led to arrangements under which it is expected that all present requirements are to be satisfied. These arrangements relate to:

- (a) 4" guns.
- (b) .5 machine guns.
- (c) Destroyers.

The Board approved of the carrying out of these arrangements for the purpose of the attainment of the objects covered on the Board's previous decisions.

Action by U.S. Government: See comments on First and Second Recommendations.

Action by Canadian Government: Approved, 5 September 1940.

PJBD Recommendation 5, 27 August 1940

Improving Communications in the Northeast

That the subject of communications between Newfoundland, the Maritime Provinces, Eastern Canada and the United States, is of high importance, the following subjects requiring to be examined:

- (a) Railway facilities.
- (b) Water transport.
- (c) Roads.
- (d) Air transport and communications.

That the establishment of additional commercial airways, complete with landing facilities and aids to air navigation, between these important areas, would be essential to the defence plan.

Action by U.S. Government: See comments on First and Second Recommendations. Portions of this recommendation were included in the First Report.

Action by Canadian Government: Approved, 5 September 1940

PJBD Recommendation 6, 27 August 1940

Production Data

That the Service Members undertake to assemble information on the production in each country of particular items of military equipment in their respective countries, not readily available in the other country, and to exchange information on this subject as data becomes available.

Action by U.S. Government: See comments on First and Second Recommendations.

Action by Canadian Government: Approved, 5 September 1940.

PJBD Recommendation 7, 27 August 1940

Joint Defence Plan

That the Service Members of the Board should proceed at once with the preparation of a detailed permanent plan for the joint defence of Canada and the United States and keep the Board informed of the progress of the work.

Action by U.S. Government: See comments on First and Second Recommendations.

Action by Canadian Government: Approved. 5 September 1940.

PJBD Recommendation 8, 11 September 1940

Defence of Newfoundland

That the United States initiate as expeditiously as practicable such portions of the increased defence of Newfoundland, covered by the Second Recommendation of the Board approved in Ottawa on August 26 and 27, as may be found to fall within the limits of bases now being acquired by the United States.

Action by U. S. Government: See comments on First and Second Recommendations.

Action by Canadian Government: Approved, 7 October 1940.

PJBD Recommendation 9, 4 October 1940

German Prisoners

The Board learned from Messrs. Emerson and Penson that the Government of the United Kingdom is now arranging to send approximately one thousand captured German airmen to Newfoundland for imprisonment there and that the Newfoundland Government is now beginning the construction of barracks for this purpose about five miles inland from the shore of Conception Bay.

The Board feels strongly that the incarceration of German prisoners in Newfoundland would present a serious military hazard which might jeopardize the Defence Scheme for Newfoundland which the Board is now preparing and thus menace the safety of Canada and the United States.

In these circumstances, the Board earnestly recommends to the Canadian Government that discussions be initiated with the Governments of Newfoundland and the United Kingdom with a view to bringing about an alteration in this plan by the diversion of these German prisoners to some less dangerous destination.

Action by U.S. Government: See comment on First Recommendation.

Action by Canadian Government: Approved, 8 October 1940. The prisoners were diverted to a camp in Canada, and this fact was reported at the 20-21 January 1941 meeting.

PJBD Recommendation 10, 14 November 1940

Air Staging Facilities - Western Canada

The Board recommends that, to implement the recommendation contained in its First Report to the respective governments regarding the development of air staging facilities across Western Canada between the United States and Alaska, suitable landing fields, complete with emergency lighting, radio aids, meteorological equipment and limited housing for weather, communication, and transient personnel be provided at the earliest possible date by Canada at Grand Prairie, Fort St. John, Fort Nelson, Watson Lake, Whitehorse, Prince George and Smithers.

This development will provide means for rapid movement of light bombers and fighter aircraft into Canada, into Central Alaska via Whitehorse, and into the Ketchikan-Prince Rupert area via Smithers and is considered essential to the defence of Western Canada, Alaska and the United States. Such means are vital to the effective use in joint continental defence of both the rapidly expanding air forces of the United States and the extension of air operating facilities in Alaska.

Action by U.S. Government: See comment on First Recommendation. The First Report of the Board, which contained a less detailed recommendation for the development of such facilities, was approved by the President on 19 November 1940.

Action by Canadian Government: Approved, 28 January 1941.

PJBD Recommendation 11, 15 November 1940

Ucluelet Airdrome (Vancouver Island)

The Board now recommends that another airdrome be constructed at Ucluelet for the following purposes:

- (a) To extend the operational ranges and areas of fighter aircraft and provide more advanced defence to our vulnerable positions
- (b) To provide bomber and fighter support to the north airdromes and towards the Queen Charlotte Islands and the West Coast up towards Prince Rupert.
- (c) To provide an alternative landing place for bombers and fighters in a very variable weather area.

Action by U.S. Government: See comment on First Recommendation.

Action by Canadian Government: Approved, 28 January 1941.

PJBD Recommendation 12, 17 December 1940

War Industry Member

That a war industry member be appointed to the Board by each of the two Governments.

Action by U.S. Government: Approved, 26 December 1940.

Action by Canadian Government: Approved, 20 January 1941.

PJBD Recommendation 13, 20 January 1941

Sault Ste. Marie

In view of the vital military importance of the Sault Ste. Marie Canals and the St. Mary's River to the defence program of the United States, and the vulnerability of the navigation channel, the Board agreed that each Government should constitute a single authority to be responsible for the safety of navigation through these waters, and that each such authority be clothed with the necessary powers and required to cooperate with the other in taking all measures necessary for the purpose.

Action by U.S. Government: Approved.

Action by Canadian Government: Approved, 27 March 1941.

PJBD Recommendation 14, 21 January 1941

United States Air Units for Newfoundland

That most urgent priority should be given to the provision of facilities for at least one United States squadron of patrol planes at Halifax and one United States squadron in the Botwood area.

Action by U.S. Government: No record of action. See comment on the First Recommendation.

Action by Canadian Government: Approved, 27 March 1941.

PJBD Recommendation 15, 16 April 1941

Newfoundland Fuel Storage

The Board reviewed the problem of fuel supply required for aerial operations from the Newfoundland Airport and in the Lewisporte-Botwood area. Previous estimates contemplated storage for 1,600,000 gallons (of which 600,000 gallons, one month's supply, would be located at Newfoundland Airport) premised on continuous supply by rail from St. John's. It has now been determined that reliance on continuous rail supply during the winter is unsound. Facts were adduced to show that a minimum storage capacity of 2,600,000 gallons will be essential before the close of navigation in the Botwood area next winter. Discussion clearly exposed the urgency of providing the increase in capacity.

It was also pointed out that not only is the increase essential for defence operations but is equally necessary for overseas ferrying of aircraft.

It is recommended that Canada provide the increased storage capacity in accordance with the responsibility accepted by the Canadian Government.

It is further recommended that the United States Government assist in the procurement of the necessary priorities to permit this recommendation to be carried out within the time specified.

Action by U.S. Government: Approved, 22 April 1941

Action by Canadian Government: Approved, 14 May 1941.

PJBD Recommendation 16, 17 April 1941

Rehabilitation of the Newfoundland Railroad

The Board, after consultation with Newfoundland Commissioner; after determination that the present condition and rolling stock (on hand or order) of the Newfoundland railroad are barely adequate for civilian requirements; and after full consideration of the great urgency of adequate supply prior to the winter of 1941 of United States bases and United States forces stationed outside base areas in Newfoundland recommends:

That the United States procure and retain title to such railroad rolling stock as is necessary for its military requirements in Newfoundland including possible operations from the Newfoundland Airport.

That the Newfoundland Government continue to operate the Newfoundland railroad and undertake at once the construction of additional facilities and necessary rehabilitation of the railroad outside of areas leased to the United States.

That necessary arrangements for essential financial assistance be immediately worked out between the United States and Newfoundland Governments.

That both Canada and the United States assist in the procurement of the necessary priorities required to permit this recommendation to be carried out in the time specified.

Action by U.S. Government: Approved, 22 April 1941.

Action by Canadian Government: Approved, 14 May 1941.

PJBD Recommendation 17, 29 July 1941

Northwest River Landing Field

In order to facilitate the ferrying of long and medium range aircraft across the Atlantic, to enhance the effectiveness of plans for hemisphere defence, to prevent congestion at the Newfoundland Airport and to provide greater security for crews and equipment, the Board recommends:

That the Canadian Government should undertake the construction of an air base in the vicinity of Northwest River, Labrador, and provide the following facilities as quickly as possible.

- (a) At least two runways, minimum 150 x 5000 feet, to enable take off and landing into prevailing winds.
- (b) Storage facilities for 450,000 gallons aviation gasoline, for 11,250 gallons aviation oil, and for other supplies.
- (c) Seven 100 gallon per minute gasoline pumping units for servicing aircraft.
- (d) Technical housing and equipment as follows:
 1. A direction finder station.
 2. An aircraft radio range station.
 3. Instrument landing equipment.
 4. An airways radio station capable of communication with stations in the U.S., Canada, Newfoundland, and Greenland and with aircraft in flight, for purposes of aircraft control, forwarding and receiving weather data and airplane movement communications.
 5. A meteorological station.
 6. A maintenance hangar (heated), minimum dimensions 150 x 200 feet.
- (e) Housing for personnel.

That if the Canadian Government should decide for any reason that it will not undertake the desired construction immediately, this decision should be made known at once to the Governments of the United States, United Kingdom and Newfoundland and that the Government of the United States be invited to provide the necessary facilities in the area under reference.

That Governments of Canada and the United States should cooperate to make provision for the necessary priorities to permit the earliest possible completion and that the Government undertaking the project should also immediately initiate the necessary measures to insure provision of an installation suitable for safe operations from the ice in the Northwest River area during the winter of 1941-42.

Action by U.S. Government: No evidence of approval in U.S. files.

Action by Canadian Government: Approved, 18 September 1941.

PJBD Recommendation 18, 29 July 1941

Underwater Defences for Argentina

That the United States proceed with the installation of underwater defences in the Argentina-Ship Harbor area.

Action by U. S. Government: See comment on First Recommendation.

Action by Canadian Government: Approved, 18 September 1941.

PJBD Recommendation 19, 29 July 1941

Canadian-Alaskan Staging Fields

On the consideration of the report as to the progress being made with the construction of the Canadian Airway between Edmonton and Whitehorse, attention was directed to the recent change in the Far Eastern situation the effect of which is to make the completion of the airway to Alaska of extreme urgency. It was pointed out that the urgent needs for air strength in Alaska may suddenly increase beyond those heretofore anticipated, that the preparation of airdromes in Alaska is being expedited by the United States as much as possible, but that large numbers of aircraft if sent there would at present be relatively isolated.

In view of this, the Board decided to invite attention to the fact that the completion of both the Canadian and the United States sections of the airway to a point which would permit its use at the earliest possible moment had become of extreme importance and to recommend that other considerations should give way to that of completing as quickly as possible the air route which will permit the rapid reinforcement of the air strength in Alaska.

Action by U.S. Government: See comment on First Recommendation.

Action by Canadian Government: Approved, 18 September 1941.

PJBD Recommendation 20, 30 July 1941

Newfoundland Roads

- (a) That improvement and maintenance of road communications is recognized as essential for effective military operations in the defence of Newfoundland.
- (b) That the Newfoundland Government should, without cost to the United States or the Canadian Government, make available the rights of way necessary for such roads as the United States or the Canadian Governments consider must be constructed for military purposes.
- (c) That the United States and Canada should be given the right to construct and maintain such roads as each individually requires in Newfoundland for military purposes without obligation either to construct or maintain any roads.

- (d) That Newfoundland, Canadian and United States vehicles would have use without tolls of any roads constructed by the United States or Canada in Newfoundland outside of base areas.
- (e) That all necessary road maintenance in Newfoundland other than as provided for above should be a responsibility of the appropriate Newfoundland authorities.

Action by U.S. Government: See comment on First Recommendation.

Action by Canadian Government: Approved, 18 September 1941.

PJBD Recommendation 21, 10 November 1941

Maintenance of Facilities

Attention was directed to the question of the maintenance of the structures, etc., provided by Canada at Gander Lake for occupation by United States Forces and it was recognized that the course of events may make it convenient to permit the use by United States Forces of like facilities in both Newfoundland and Canada and also permit the use of facilities in United States by Canadian Forces. Consideration was accordingly given to the general principles which should govern the responsibilities of each country in respect of the maintenance of structures, etc., built by the Government of either which are occupied by the Forces of the other, and the Board decided to make the following 21st Recommendation:

The Board recommends that when facilities are provided by the Government of either country for the occupation of Forces of the other the following principles should apply to the maintenance, upkeep and servicing of such facilities, subject to such local definition and if necessary modification as the circumstances require:

1. Any building constructed by the Government of one country and wholly occupied by Forces of the other should be maintained by the occupying Forces and at the termination of the occupation turned over to the Government of the country by which it was provided in the same condition as when the occupation commenced, ordinary wear and tear, act of God, enemy action, riot, insurrection or fire excepted.
2. The same rule should apply to structures appurtenant to buildings when these are included in an area capable of delimitation and occupied by the Forces concerned which should in these circumstances undertake the policing of the area.
3. The occupying Forces should also be responsible for the heating, lighting and other services relating to any building or area occupied by them in all cases in which the service is derived from a source adapted exclusively to take care of the building or area in question but in other cases the services should be provided on an equitable basis by the Government of the country by which the occupation is permitted.
4. No occupying Forces should make any structural change in existing facilities without the approval of the service by which the area is set aside for occupation or the occupied buildings are provided.

Action by U.S. Government: Approved, 14 November 1941.

Action by Canadian Government: Approved, 26 November 1941.

PJBD Recommendation 22, 20 December 1941

Decentralization of Functions to Local Commanders

That the United States and Canadian Governments now authorize the Commanders named in paragraph 12 of ABC-22, or their duly authorized representatives, to effect by mutual agreement any arrangements they deem necessary for the perfection of preparations for the common defence including but not limited to, the installations of accessory equipment in the territory of either, the transit of armed forces, equipment or defence materials into or through the territory of either, and the utilization by either nation of the base and military facilities of the other.

Action by U.S. Government: Approved, 24 December 1941.

Action by Canadian Government: Approved, 14 January 1942.

PJBD Recommendation 23, 20 December 1941

Co-ordination of Aviation Training Programs

That the Canadian and United States Governments should consider the advisability of arranging for a meeting of appropriate representatives of Great Britain, Canada and the United States to make appropriate recommendations for co-ordination of the entire aviation training programs to be conducted in Canada and the United States.

Action by U.S. Government: Approved, 24 December 1941.

Action by Canadian Government: Approved, 14 January 1942.

PJBD Recommendation 24, 26 February 1942

Military Highway to Alaska

As its Twenty-Fourth Recommendation, the Board accordingly, as a matter pertaining to the joint defence of Canada and the United States, recommends the construction of a highway along the route that follows the general line of airports, Fort St. John-Fort Nelson-Watson Lake-Whitehorse-Boundary-Big Delta, the respective termini connecting with existing roads in Canada and Alaska.

Action by U.S. Government: Approved, 9 March 1942.

Action by Canadian Government: Approved, 5 March 1942.

PJBD Recommendation 25, 25-26 February 1942

Defence of Sault Ste. Marie Against Air Attack

- (a) That the Royal Canadian Air Force undertake to make an immediate and comprehensive further study of the data available regarding the danger of air attack to the Sault Ste. Marie area.
- (b) That the Canadian Army assign a 4-gun, heavy, anti-aircraft battery to Sault Ste. Marie, to protect the Canadian Locks and to tie in with the United States force in order that all-round zone defence may be established. In the event of Canada being unable to provide this equipment within the near future, the United States Army endeavor to lend the necessary guns and stores for manning by the Canadian Army until such time as Canada can meet this commitment from her own production.
- (c) That the said Canadian anti-aircraft battery come under the operational command of the Commanding General, Sault Ste. Marie Military District, (Michigan).

Action by U.S. Government: Approved, 9 March 1942.

Action by Canadian Government: Approved, 26 March 1942.

PJBD Recommendation 26, 9 June 1942

Northeast Short-Range Ferry Routes to United Kingdom

- (a) That the airfields in Canadian territory on the ferry routes outlined in the Army Air Forces appreciation dated June 6th be constructed with such variations as the detailed survey, now under way, may determine to be advisable.
- (b) That the Canadian Government construct or authorize the United States Government to construct these fields and inform the United States Government as promptly as possible what fields, if any, Canada will construct.
- (c) That the existing ferry airdrome facilities in Canada and Newfoundland, including Labrador, form a part of the proposed ferrying project and be increased, wherever necessary, to appropriate capacity.
- (d) That such additional radio weather reporting facilities for these routes be provided and maintained as may be agreed upon by the United States and the Canadian Governments.
- (e) That all costs of constructing air fields and other installations in connection with this project be borne by the Government which agrees to undertake that part of the project.
- (f) That suitable arrangements be made in Washington and Ottawa to insure the proper centralization of responsibility for and control over the work of construction, and to provide the maximum facilities for instant and effective contact and cooperation between the appropriate authorities of the two countries.
- (g) That the proposals relating to defence, to the maintenance of Canadian sovereignty and the postwar disposition of the new installations as outlined in the memoranda under reference be accepted by the two Governments.
- (h) That these airfields and facilities be made available for the use of the Royal Air Force Ferry Command.

Action by U.S. Government: Approved, 3 July 1942.

Action by Canadian Government: Approved, 12 June 1942.

PJBD Recommendation 27, 6 July 1942

Flow of Materials to Canada

That the Governments of Canada and of the United States take immediate steps to eliminate or suspend for the duration of the war every possible formality of customs, import duties, tariffs, and other regulations which prohibit, delay or otherwise impede the free flow between the two countries of munitions and war supplies and of the persons or materials connected therewith.

Action by U.S. Government: Approved, 8 August 1942.

Action by Canadian Government: No formal approval.

PJBD Recommendation 28, 13 January 1943

Postwar Disposition of U.S. Projects in Canada

The Board recommends the approval of the following formula as a generally fair and equitable basis to be used by reference whenever appropriate in the making of agreements in the future and to cover such defence projects, if any, the postwar disposition of which has not previously been specifically provided for:

- A. All immovable defence installations built or provided in Canada by the Government of the United States shall within one year after the cessation of hostilities, unless otherwise agreed by the two Governments, be relinquished to the Crown either in the right of Canada or in the right of the Province in which the same or any part thereof lies, as may be appropriate under Canadian law.
- B. All movable facilities built or provided in Canada by the Government of the United States shall within one year after the cessation of hostilities, unless otherwise agreed by the two Governments, at the option of the United States Government
 - 1) be removed from Canada: or
 - 2) be offered for sale to the Government of Canada, or with the approval of the Government of Canada, to the Government of the appropriate Province at a price to be fixed by a Board of two appraisers, one to be chosen by each country and with power to select a third in the case of disagreement.
- C. In the event that the United States Government has foregone its option as described in B
 - (1) and the Canadian Government or the Provincial Government decides to forego its option as described in B
 - (2) the facility under consideration shall be offered for sale in the open market, any sale to be subject to the approval of both Governments.

D. In the event of no sale being concluded the disposition of such facility shall be referred for recommendation to the Permanent Joint Board on Defence or to such other agency as the two Governments may designate.

The principles outlined above shall reciprocally apply to any defence projects and installations which may be built in the United States by the Government of Canada. All of the foregoing provisions relate to the physical disposition and ownership of projects, installations, and facilities and are without prejudice to any agreement or agreements which may be reached between the Governments of the United States and Canada in regard to the postwar use of any of these projects, installations, and facilities.

Action by U.S. Government: Approved, 21 January 1943.

Action by Canadian Government: Approved, 21 January 1943.

PJBD Recommendation 29, 24 February 1943

United States-Alaska Air Route

1. That the Department of Transport (Canada) be responsible for the completion of all facilities on this route presently in process of actual construction by contractors under contract to the Department of Transport, but that wherever possible and in order to expedite construction, United States Engineer troops be used to assist in such construction.

2. That the construction of the following facilities be approved by the Canadian Government, subject to the submission to the Department of Transport of a detailed plan showing the location of such facilities at the respective airports:

| EDMONTON | PRIORITY |
|---------------------------------------------------------|----------|
| 4 Barracks—68-man capacity each | A |
| 1 Transient Officers Quarters—40-man capacity | B |
| 1 Mess Hall—1,000-man capacity. | C |
| 1 Laundry—3,000 capacity | D |
| 2 Hangars—150' x 200'. | E |
| 2 Warehouses-50' x 400' | F |
| 1 Garage—70' x 200' | G |
| 1 Recreation Hall & Gymnasium | H |
| Doors on north end of present #1 Hangar. | I |

| WHITEHORSE | PRIORITY |
|---------------------------------------------------------------|----------|
| 4 Barracks—68-man capacity each | A |
| 2 Transient Officers Quarters—40-man capacity. | B |
| 1 Mess Hall — 500-man capacity | C |
| 1 Laundry—2,000 capacity | D |
| 1 Hangar and 20,000 sq. ft.—220' x 200' office space. | E |

| | |
|---------------------------------------------------|---|
| 1 Warehouse—40' x 2 0 0 ' | F |
| 1 Garage-70' x 2 0 0 ' | G |
| 1 Recreation Hall and G y m n a s i u m | H |

3. That the United States Army Air Forces be responsible for the construction of all facilities set forth in 2: (construction to be accomplished by United States Engineer troops or by contract with Canadian or United States contractors, except that at Edmonton airport no construction shall be undertaken by a United States contractor except with the prior approval of appropriate Canadian authorities. If United States contractors are employed, Canadian and United States civilian labor will not be used on the same specific project at Edmonton).

4. That, inasmuch as speed of completion of these projects is of the highest importance, it be understood that contracts with Canadian contractors may require the employment of Canadian labor on a basis of three shifts daily.

5. That if, in the course of construction of the various projects at Edmonton airport, it becomes apparent that United States Engineer troops, or Canadian contractors, or both, are unable to complete any project within the time required, or are unable to undertake the construction of necessary additional facilities, upon appropriate representation the Canadian Government authorize the use of United States contractors, employing United States labor.

6. That the United States Forces be authorized further to expand the facilities, including airports, on this route as may be required subject to the following conditions:

- a. The submission of a detailed plan showing the location of the proposed facilities and the approval thereof by appropriate Canadian officials.
- b. No United States contractor or labor other than the United States Engineer troops shall be employed at Edmonton without the prior approval of the Canadian Government.

7. That in the construction of any such additional facilities, including airports, at any point north of Edmonton, United States Engineer troops, or Canadian or United States contractors employing United States labor may be employed, except that Canadian and United States contractors be not engaged in the same specific project. (At Edmonton, work to be performed by United States Engineer troops or Canadian contractors, within the limit of the ability of such contractors to perform the services required.)

8. That in all cases where civilian labor is employed, if Canadian contractors are available, their services shall be utilized, within the limit of their abilities, in the construction of these projects.

9. That in any case where Canadian contractors are employed by the United States Forces in the construction of any projects, the United States Forces be responsible for the administration and supervision of the contract.

10. That the Department of Transport (Canada) designate a responsible official to be stationed on this route with authority to make decisions with respect to location of buildings and any other matter which properly may be brought to his attention.

Action by U.S. Government: Approved, 1 April 1943

Action by Canadian Government: Not approved. However, construction of the projects of this recommendation was approved, subject to certain conditions, by separate action of the Canadian Government on 5 June 1943.

PJBD Recommendation 30, 1-2 April 1943

Use of Non-Rigid Airships, Eastern Canadian Waters

That the Governments of the United States and Canada, having a mutual interest in the proposal to utilize non-rigid airships in antisubmarine activities in Eastern Canadian waters at the earliest practical date, appoint a Joint Canadian-American Board of officers to investigate, consult and report on the proposal, and on the selection of suitable base sites and facilities, in that area, to support the operation of not more than twelve airships commencing about May, 1944.

Action by U.S. Government: Approved, 13 April 1943.

Action by Canadian Government: Not approved. Although the Canadian Government was not prepared to approve the recommendation in the form submitted, it had no objection to appointment of the board of officers or to examination of the problem. At its subsequent meeting, 6-7 May 1943, the Board agreed that this qualified action met the essence of the original proposal.

PJBD Recommendation 31, 6-7 May 1943

Maintenance and Control of Airdromes in Canada

1. In cases in which the airfield is used principally or exclusively by U.S. forces the United States shall normally be responsible for defence, maintenance and control.
2. In all other cases, unless some special arrangement has been made, Canada shall be responsible for defence, maintenance and control.
3. Provision for the defence of airfields shall, in all cases, be of a standard acceptable to the Canadian Chiefs of Staff.
4. The assignment of responsibilities in respect of any airfield shall remain unchanged during the war except by mutual agreement; provided that should Canada inform the United States that it is prepared to assume such responsibilities in respect of any airfield previously controlled by the U.S. the necessary arrangements shall be concerted between the two Governments.
5. The United States Government may station a liaison officer at any airfield in Canada used by United States forces; and the Canadian Government may station a liaison officer at any airfield in Canada the control of which is exercised by the United States.

It was agreed that upon the acceptance of this Recommendation the Air Members on the Board shall prepare a schedule showing the application of the principles to the airfields affected for submission to the Board as a basis for a further recommendation.

Action by U.S. Government: Approved, 3 June 1943.

Action by Canadian Government: Approved, 2 June 1943.

PJBD Recommendation 32, 24-25 August 1943

Maintenance and Control of Facilities

PART I *Definitions*

That for the purposes of this Recommendation, the following definitions apply:

1. *Control:*

Control of airport and airways traffic, and airport administration, provided that regulations applicable to airway and airport traffic control shall be prepared jointly by the using services, and shall be limited to those matters essential to the orderly control of traffic movement, and shall not include ceiling and visibility limitation for take-off and landing.

Note: Airport administration, in the military sense, consisting of those functions pertaining to command.

2. *Maintenance:*

a. *Airfields:*

Maintenance of airfield surfaces including runways, taxiways, parking areas, hard standings, and snow removal according to the standard of the principal user. The priority of such snow removal shall be as prescribed by the principal user.

Maintenance of access roads used solely, or nearly so, for the servicing of the airport and of roads and drainage ditches within and adjacent to the airport area, including snow clearance.

b. *Other Facilities:*

Maintenance of local airport landline communication systems, power, heating, lighting, water, fire-fighting and sewage systems, with the exception of that part of these systems installed in buildings.

c. *Responsibility of Using Service:*

Proper maintenance of all buildings and facilities installed therein is the responsibility of the using service. When facilities are provided by the Government of one country for the occupation of forces of the other, the principles set forth in the Twenty-First Recommendation of the Board apply to the maintenance, upkeep and servicing of such facilities.

d. Responsibility of Officers Commanding:

In the discharge of the above responsibilities, Officers Commanding will be authorized to make such definitions or modifications as local circumstances may require.

3. *Defence:*

Defence of the airport area in conformance with standards acceptable to the Canadian Chiefs of Staff.

Note: Local security of aircraft, technical installations and building areas is the responsibility of the using Service.

PART II
Schedule of Responsibility

1. *Northwest Staging Route:*

- a. That Canada be responsible for the control, maintenance and defence of the following airports:

Feeder: Prince George, Kamloops, B.C.; Lethbridge and Calgary, Alta.; Regina, Sask.
Main: Edmonton, Alta.; Grande Prairie, Alta.; Fort St. John and Fort Nelson, B.C.;
Watson Lake and Whitehorse, Y.T.
Intermediate: Beatton River and Smith River, B.C.; Teslin, Aishihik and Snag, Y.T.;
(Whitecourt, Alta. when constructed).

- b. That the U.S. be responsible for the maintenance, local airport control and defence of the following airports:

Main: Edmonton Satellite
Note: Edmonton Satellite will be subject only to airways traffic control by Canada under mutually acceptable regulations.

2. That the United States be responsible for the *control, maintenance and defence* of the following flight strips:

- a. Canol Project (N.W.T.)

(i) Canol #1A

Waterways, Alta.; Embarras, Alta.; Fort Smith, Providence, Resolution, Hay River, Fort Simpson, Wrigley, Norman Wells, Canol Camp, N.W.T.

(ii) Canol #1 East and West

Goodland Lake and Twitya River, N.W.T.; Sheldon Lake, Pelly River and Quiet Lake, Y.T.

- b. Alaska Highway

Dawson Creek, Prophet River, Sikanni Chief River, Trout River and Pine Lake, B.C.; Squanga Lake, Pon Lake and Burwash, Y.T.

3. *Northeast Short-Range Ferry Route to U.K.:*

- a. That the United States be responsible for the control, maintenance and defence of the following airports:

Western Sector: The Pas, Churchill, Man.; Southampton Island, N.W.T.

Eastern Sector: Fort Chimo, P.Q.; Frobisher Bay, N.W.T.

Others: Mingan, P.Q.

Note: Mingan will be subject only to airways traffic control by Canada under mutually acceptable regulations.

- b. That Canada be responsible for the control, maintenance, and defence of the following airports: Moncton, N.B.; Dorval, P.Q.

Action by U.S. Government: Approved, 24 September 1943.

Action by Canadian Government: Approved, 22 September 1943.

PJBD Recommendation 33, 6-7 September 1944

Postwar Disposition of U.S. Projects in Canada

The Permanent Joint Board on Defence recommends that the following formula be applied to the disposition of all defence facilities constructed or provided in Canada by the United States (and mutatis mutandis to any defence facilities constructed or provided in the United States by Canada) which have not already been dealt with.

Immovables

- A — The Government of the United States shall, within three months from the date of the approval of this Recommendation, supply the Government of Canada with a list of immovables (hereinafter referred to as facilities) which it desires to make subject to the provisions of this Recommendation;
- B — In the case of each of the facilities included in the list referred to in A the Canadian Government and the United States Government will each appoint one qualified appraiser whose joint duty it will be to appraise such facility in order to determine the fair market value thereof at the time and place of appraisal. If the two appraisers cannot agree on the fair market value, they will select a third appraiser to determine this value. The amount set by the appraisers shall be paid to the United States Government by the Government of Canada:

Provided that the foregoing paragraphs A and B shall not apply to any facilities heretofore specifically provided for.

- C — Any existing facility not included in the United States list shall, within one year after the cessation of hostilities, be relinquished, without cost, to the Crown either in the right of Canada or in the right of the Province in which the same or any part thereof lies, as may be appropriate under Canadian law.

Movables

- A — The Government of the United States shall remove from Canada all those items which it Desires.
- B — The Government of Canada shall arrange through the appropriate governmental agencies for the purchase from the United States of such remaining items as it desires to obtain for its own use or disposition.
- C — All other movables shall be transferred to a designated agency of the Canadian Government and shall be sold or disposed of by such agency, the proceeds to be paid to the Government of the United States,

provided that, in connection with the items referred to in Paragraph C, the United States Government shall be represented by an officer designated by it for that purpose, who shall have an equal voice in the setting of prices, the allocation of priorities, the assessment of legitimate sales costs and other details of the sale or other disposal of the items concerned; and provided further that any such items remaining unsold at the end of two years from the time they are transferred to the Canadian agency concerned shall either be declared of no value and the account closed or, at the option of the United States, shall be removed from Canada by the United States authorities.

Action by U.S. Government: Approved, 11 November 1944, including the Canadian proviso.

Action by Canadian Government: Approved, 27 September 1944, with the following proviso: That, as there are certain facilities whose disposal would entail expenses such as custody and demolition, any expense of such a character would be taken into consideration in the final accounting.

PJBD Recommendation 34, April 1946

PJBD's use in-perpetuity

Recommendation 34 was submitted at the same time as Recommendation 35. Both recommendations “outlined a series of principles of defense cooperation”⁵²⁶ and advocated for the PJBD's continuity in-perpetuity.

⁵²⁶ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 153.

PJBD Recommendation 35, April 1946

PJBD's use in-perpetuity

Recommendation 35 was submitted at the same time as Recommendation 34. Both recommendations “outlined a series of principles of defense cooperation”⁵²⁷ and advocated for the PJBD’s continuity in-perpetuity.

The Canadian government dismissed Recommendation 35. It is inferred that Ottawa was concerned over the word “cooperation,” as Cabinet considered the US relationship in the post-War period.⁵²⁸

The drafter of this Recommendation, U.S. Section Army member Guy V. Henry, was seen by the US government as overstepping the new Joint Chiefs of Staff.⁵²⁹

PJBD Recommendation 36, 20 November 1946

PJBD's use in-perpetuity

Recommendation 36 is a revised version of 35. It still advocated for the Board’s use in-perpetuity and its future role as an advisory body, but the language was changed to be more palatable to both governments.

Action by Canadian Government: Approved, 20 November 1946.

Action by U.S. Government: Approved, 20 November 1946.⁵³⁰

PJBD Recommendation 47/1

Reciprocal Transportation

Recommendation 47/1 concerned the reciprocal transportation of military transportation onboard military aircraft belonging to either Canada or the United States. This Recommendation started the practice of numbering the Recommendation with the year and number, rather than the sequential formatting.⁵³¹

⁵²⁷ Ibid.

⁵²⁸ Conliffe, “The Permanent Joint Board on Defence: 50 years after FDR’s Kingston Declaration, 59.

⁵²⁹ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 153-155; DHIST 82/820, *A Brief History of the Canada-United States Permanent Joint Board on Defence*, 8.

⁵³⁰ Conliffe, “The Permanent Joint Board on Defence: 50 years after FDR’s Kingston Declaration, 59.

⁵³¹ Ibid.

PJBD Recommendation 48/1

St. Lawrence Seaway

Recommendation 48/1 advised both governments to reduce delays in order to expedite the construction of St. Lawrence Seaway and Power Project.⁵³²

PJBD Recommendation 48/2

Canadian Materiel Purchase from the United States

Recommendation 48/2 advised Canada purchase military materiel, such as arms, equipment, weapons, and other supplies from the United States.⁵³³

PJBD Recommendation 49/1

Benefits of Economic Trade of Military Equipment

Recommendation 49/1 outlined the benefits of economic trade of military equipment between Canada and the United States relative to North American defence and security. A reciprocal purchasing program between the militaries were implemented in 1950.⁵³⁴

PJBD Recommendation 50/1

Administrative Functions for US troops in Newfoundland

Recommendation 50/1 advised on the administrative functions (taxes, customs, duties, offices, and jurisdictions) for US service personnel stationed in Newfoundland. Canadian legislation was subsequently changed to follow the PJBD's Recommendation.⁵³⁵ Newfoundland was previously a British dominion until its entry into Canadian Confederation in 1949.

PJBD Recommendation 51/1

Extension of the Pinetree Line

Recommendation 51/1 concerned the study and advisement of the continental Air Defense System. It led to PJBD's creation of "The Pinetree System" document that recommended the northward extension of both Canadian and American radar warning systems into an amalgamated, bilateral air defence system; reducing radar coverage gaps and integrating air warning and interception for

⁵³² Ibid.; Beatty, *The Canada-United States Permanent Joint Board on Defense*, 231.

⁵³³ Ibid.

⁵³⁴ Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 154. The US Congress passed the "Mutual Defense Assistance Act," which included a Buy American clause, on 6 October 1949; Beatty, *The Canada-United States Permanent Joint Board on Defense*, 189, 196. Beatty also makes the correlation between 49/1 and the Defense Production Sharing Agreement (DPSA) signed in 1956.

⁵³⁵ Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 154.

Canada and the United States. Construction of the Mid-Canada Line (McGill Fence) was announced by both governments in 1954; discussions over its successor, the Distant Early Warning (DEW) Line commenced the same year.⁵³⁶

Action by Canadian Government: Approved, 20 February 1951.

Action by U.S. Government: Approved, 14 April 1951.⁵³⁷

PJBD Recommendation 51/2

St. Lawrence Seaway

Recommendation 51/2 reiterated the support for the development of the St Lawrence Seaway.⁵³⁸ President Truman urged Congress in January 1952 to pass legislation approving the 1941 St. Lawrence Seaway and Power Project.⁵³⁹

PJBD Recommendation 51/3

Combined Air Defence Training Exercises

Recommendation 51/3 discussed the prospect of combined air defence training exercises between Canada and the United States.⁵⁴⁰

PJBD Recommendation 51/4⁵⁴¹

Interception of Unidentified Aircraft

That aircraft controlled by the Air Defence System of the United States or of Canada engaged in intercepting unidentified aircraft crossing the border between Canada and the United States be permitted to fly over the territory of both countries as may be required to carry out effective interception. These flights would be conducted under the following provisions:

- a. Investigations by U.S. military aircraft over Canadian territory would only occur in the case of an aircraft headed for the Canada-United States border from the Canadian side whose flight plan had not been transmitted to the U.S. authorities; or which was off course, and then only in the event that the actions of the aircraft gave rise to a reasonable

⁵³⁶ Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration, 59; Goette, *Sovereignty and Command*, 142-143; Beatty, *The Canada-United States Permanent Joint Board on Defense*, 249, 252.

⁵³⁷ Goette, *Sovereignty and Command*, 142-143. Cited as:

⁵³⁸ Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration, 59

⁵³⁹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 231.

⁵⁴⁰ Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration, 59; Combined is one or more nation working together. Joint is one or more service operating together (i.e. Air Force and Army). See: Charron, "The Permanent Joint Board on Defence (PJBD): How Permanent and Joint? Celebrating 80 Years of Cooperation," 7.

⁵⁴¹ Goette, *Sovereignty and Command*, 202.

interpretation of intention to cross the international boundary; the activities of Canadian military aircraft over U.S. territory would be similarly restricted.

- b. Close investigation with all due precaution, or interrogation, would be performed solely on unidentified multi-engine aircraft for the purpose of obtaining electronic or visual identification. No attempt would be made to order an intercepted aircraft to land, nor to open fire except when the intercepted aircraft is over the national territory of the air force performing the interception.
- c. Investigating aircraft would not approach closer, in accordance with Civil Aeronautics Authority and Department of Transport standards, than is necessary to establish identification.
- d. Translation of the general principles and limitations of the agreement into operational instructions of the two air forces would be performed by a Canadian-United States team, and
- e. These arrangements will remain in force until modified by agreement or terminated by either Government.

This Recommendation was superseded by PJBD Recommendation 53/1.

Action by Canadian Government: Approved, 30 May 1951.

Action by U.S. Government: Approved, October 1951.⁵⁴²

PJBD Recommendation 51/5, 11 November 1951⁵⁴³

Regulations for cross-Border Aircraft

Recommendation 51/5 concerned the regulations for the movement of aircraft across the shared Canada-United States border.⁵⁴⁴

PJBD Recommendation 51/6, 12 November 1951

Mutual Reinforcement in a Tactical Situation

That when the Air Defence Commanders of the United States and Canada agree that mutual reinforcement of their Air Defence Forces is necessary in the light of the tactical situation:

⁵⁴² Ibid., 147.

⁵⁴³ Ibid., 146.

⁵⁴⁴ Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 157.

- a. The Canadian Air Defence Commander should have the power, in the event of war, to authorize the redeployment of U.S.A.F. Air Defence Forces to Canada and the redeployment of R.C.A.F. Air Defence Forces to the United States;
- b. The U.S. Air Defence Commander should have the power, in the event of war, to authorize the redeployment of U.S.A.F. Air Defence Forces to Canada.⁵⁴⁵

Action by Canadian Government: Approved, 12 November 1951

Action by U.S. Government: Approved, March 1952

PJBD Recommendation 52/1

Transit of Territorial Waters

Recommendation 52/1 advised that informal and operational transit of territorial waters and to ports be approved on a service-to-service level. Formal visits to port would be arranged via the State Department and Department of External Affairs.⁵⁴⁶

PJBD Recommendation 52/2

Regulations for private maritime operators

Recommendation 52/2 advised on regulations for private maritime operators and the use of electromagnetic aids to navigation, as exploitation of these aids was feared as an adversarial tactic.⁵⁴⁷

PJBD Recommendation 53/1, 1 October 1953⁵⁴⁸

Engagement of Unidentified Aircraft (The NORAD Recommendation)

Aircraft controlled by the Air Defence System of the United States, or of Canada, engaged in intercepting unidentified aircraft during peacetime, shall be permitted to fly over the territory of either country as may be required to carry out effective interception. These flights will be carried out under the following provisions:

- a. Investigations of unidentified aircraft by the United States military aircraft over Canadian territory will only occur when it is not possible for a Canadian military aircraft to carry out the investigation; the activities of Canadian military aircraft over United States territory will be similarly restricted. For the purpose of this agreement, an unidentified aircraft is an aircraft which flies within the air defence identification zone in apparent violation of the rules for operation within such zone. When the pattern of behaviour of an aircraft is

⁵⁴⁵ Goette, *Sovereignty and Command*, 201.

⁵⁴⁶ Conliffe, "The Permanent Joint Board on Defence: 50 years after FDR's Kingston Declaration, 59; Conliffe, "The Permanent Joint Board on Defence, 1940-1988," 157.

⁵⁴⁷ Ibid.

⁵⁴⁸ Goette, *Sovereignty and Command*, 209. Cited as: PJBD Recommendations DHH 79/35.

sufficiently suspicious to justify a belief that it has hostile intentions, it may also be considered to be an unidentified aircraft.

- b. In accordance with published civil and military regulations, investigating aircraft will not approach closer than is necessary to establish identification. Investigating or interrogation will be performed solely on unidentified aircraft for the purpose of obtaining electronic or visual identification.
- c. The Rules of Interception and Engagement of the country over which the interception or engagement takes place are to apply, even though the intercepting aircraft is being controlled from the other country.
- d. The engagement of an aircraft is to be carried out only on orders issued by the Air Defence Commander of the country over which the engagement is to take place, or by an officer who has been delegated the requisite powers. The authority to issue orders to engage an unidentified aircraft should, to the greatest extent possible, be retained by the Air Defence Commander. However, when circumstances so necessitate, he may delegate such authority to a qualified officer not less in status than the senior officer in an Air Defence Control Center.
- e. Translation of the general principles of this arrangement into coordinated operational instructions will be carried out by the Air Defence Commanders concerned.
- f. This arrangement will remain in force until modified by mutual agreement, or until terminated by either Government.

This Recommendation supersedes Recommendation 51/4.

PJBD Recommendation 64/1⁵⁴⁹

Unknown – inferred that it regards the placement of US nuclear weapons on Canadian soil

Recommendation 64/1 is unknown. It is inferred that, given the 1963 in-principle agreement to place US nuclear weapons on Canadian soil negotiated by Prime Minister Pearson and President Kennedy, that this Recommendation is on the topic of nuclear weapons and Canadian participation.

⁵⁴⁹ Conliffe, “The Permanent Joint Board on Defence, 1940-1988,” 161. This is the only reference to 64/1 in any PJBD literature; For context on the 1963 in-principle agreement, see: Beatty, *The Canada-United States Permanent Joint Board on Defense*, 300-301.

*Thank you to Jay Dion for transcribing this appendix.

Appendix C

Meeting Dates and Locations of the Canada-U.S. Permanent Joint Board on Defence, 1940-1963⁵⁵⁰

| Meeting No. | Location | Date | Amount per Year |
|-------------|---------------------------------------|-----------|-----------------|
| 1 | Ottawa, Canada | Aug. 1940 | |
| 2 | Washington, D.C. | Sep. 1940 | |
| 3 | Nova Scotia and Boston, Massachusetts | Oct. 1940 | |
| 4 | San Francisco, California | Nov. 1940 | |
| 5 | New York, New York | Dec. 1940 | 5 |
| 6 | Montreal, Canada | Jan. 1941 | |
| 7 | Buffalo, New York | Feb. 1941 | |
| 8 | Montreal, Canada | Apr. 1941 | |
| 9 | Washington, D.C. | May 1941 | |
| 10 | Montreal, Canada | Jul. 1941 | |
| 11 | New York, New York | Sep. 1941 | |
| 12 | Montreal, Canada | Nov. 1941 | |
| 13 | New York, New York | Dec. 1941 | 8 |
| 14 | Montreal, Canada | Jan. 1942 | |
| 15 | New York, New York | Feb. 1942 | |
| 16 | Montreal, Canada | Apr. 1942 | |
| 17 | New York, New York | Apr. 1942 | |
| 18 | Quebec, Canada | May 1942 | |
| 19 | Montreal, Canada | Jun. 1942 | |
| 20 | New York, New York | Jul. 1942 | |
| 21 | Montreal, Canada | Sep. 1942 | |
| 22 | St. John's, Newfoundland | Sep. 1942 | |
| 23 | New York, New York | Oct. 1942 | |
| 24 | Montreal, Canada | Dec. 1942 | 11 |
| 25 | New York, New York | Jan. 1943 | |
| 26 | Montreal, Canada | Feb. 1943 | |
| 27 | New York, New York | Apr. 1943 | |
| 28 | Montreal, Canada | May 1943 | |
| 29 | Vancouver, B.C. | Jul. 1943 | |
| 30 | New York, New York | Aug. 1943 | |
| 31 | Montreal, Canada | Nov. 1943 | 7 |
| 32 | New York, New York | Jan. 1944 | |
| 33 | Montreal, Canada | Apr. 1944 | |
| 34 | New York, New York | Jun. 1944 | |
| 35 | Montreal, Canada | Sep. 1944 | |

⁵⁵⁰ Beatty, *The Canada-United States Permanent Joint Board on Defense*, 349-352.

| | | | |
|----|------------------------------------|-----------|---|
| 36 | New York, New York | Nov. 1944 | 5 |
| 37 | Montreal, Canada | Jan. 1945 | |
| 38 | Ottawa, Canada | Apr. 1945 | |
| 39 | New York, New York | Jun. 1945 | |
| 40 | Montreal, Canada | Sep. 1945 | |
| 41 | New York, New York | Nov. 1945 | 5 |
| 42 | Quebec, Canada | Jan. 1946 | |
| 43 | New York, New York | Mar. 1946 | |
| 44 | Ottawa, Canada | Apr. 1946 | |
| 45 | New York, New York | Sep. 1946 | |
| 46 | Montreal, Canada | Nov. 1946 | 5 |
| 47 | Winnipeg, Canada | Feb. 1947 | |
| 48 | Dayton, Ohio | May 1947 | |
| 49 | New York, New York | Sep. 1947 | |
| 50 | Toronto, Canada | Nov. 1947 | 4 |
| 51 | Patuxent River, Maryland | Feb. 1948 | |
| 52 | Trenton, Ontario, Canada | Jun. 1948 | |
| 53 | Mitchell AFB, Long Island | Aug. 1948 | |
| 54 | Montreal, Canada | Dec. 1948 | 4 |
| 55 | West Point, New York | Mar. 1949 | |
| 56 | Edmonton, Alberta, Canada | Jun. 1949 | |
| 57 | Annapolis, Maryland | Oct. 1949 | 3 |
| 58 | St. John's, Newfoundland | Jan. 1950 | |
| 59 | Montreal, Canada | Mar. 1950 | |
| 60 | Toronto, Canada | May 1950 | |
| 61 | Mitchell AFB, Long Island | Oct. 1950 | 4 |
| 62 | The Pentagon, Washington, D.C. | Jan. 1951 | |
| 63 | Patrick AFB, Banana River, Florida | Jan. 1951 | |
| 64 | Fort Frontenac, Kingston, Canada | May 1951 | |
| 65 | Fort Churchill, Manitoba | Aug. 1951 | |
| 66 | Fort Bliss, Texas | Nov. 1951 | 5 |
| 67 | Biloxi, Mississippi | Mar. 1952 | |
| 68 | Western Canada-Alaska | Jun. 1952 | |
| 69 | Goose Bay, Newfoundland | Sep. 1952 | 3 |
| 70 | Aberdeen Proving Ground, Maryland | Jan. 1953 | |
| 71 | USS Franklin D. Roosevelt | Apr. 1953 | |
| 72 | Lac St. Denis, Quebec, Canada | Jun. 1953 | |
| 73 | Rivers, Manitoba, Canada | Oct. 1953 | 4 |
| 74 | ADC Colorado Springs, Colorado | Jan. 1954 | |
| 75 | Governors Island, New York | Apr. 1954 | |
| 76 | HMCS Ontario, Vancouver | Jul. 1954 | |
| 77 | Toronto, Canada | Oct. 1954 | 4 |
| 78 | USS Wisconsin, Panama | Jan. 1955 | |
| 79 | Lexington, Massachusetts | Apr. 1955 | |
| 80 | Camp Borden, Ontario, Canada | Jul. 1955 | |

| | | | |
|-----|-------------------------------------------------------------------------|-----------|---|
| 81 | Halifax, Nova Scotia | Nov. 1955 | 4 |
| 82 | Fort Bliss, Texas | Jan. 1956 | |
| 83 | Camp Lejeune, North Carolina | May 1956 | |
| 84 | East Lansing, Michigan | Jul. 1956 | |
| 85 | Cold Lake, Alberta, Canada | Sep. 1956 | 4 |
| 86 | Barksdale AFB, Louisiana | Jan. 1957 | |
| 87 | Fort Bragg, North Carolina | May 1957 | |
| 88 | Fort Churchill, Manitoba, Canada | Jul. 1957 | 3 |
| | <u>RCN cancelled Esquimalt, B.C. because of Queen's visit to Canada</u> | | |
| 89 | Guantanamo Bay, Cuba | Jan. 1958 | |
| 90 | Colorado Springs, Colorado | Apr. 1958 | |
| 91 | La Citadelle, Quebec, Canada | Jul. 1958 | |
| 92 | Montreal, Canada | Oct. 1958 | 4 |
| 93 | Fort Knox, Kentucky | Jan. 1959 | |
| 94 | Norfolk, Virginia | Apr. 1959 | |
| 95 | North Bay, Ontario, Canada | Aug. 1959 | 3 |
| 96 | Eglin Air Force Base, Florida | Jan. 1960 | |
| 97 | Fort Huachuca, Arizona | Apr. 1960 | |
| 98 | Camp Gagetown, New Brunswick | Aug. 1960 | 3 |
| 99 | HMCS Bonaventure, Halifax, Nova Scotia | Jan. 1961 | |
| 100 | U.S. Naval Base, Key West, Florida | Apr. 1961 | |
| 101 | Cold Lake, Alberta, Canada | Sep. 1961 | 3 |
| 102 | Orlando AFB, Orlando, Florida | Feb. 1962 | |
| 103 | Fort Benning, Georgia | May 1962 | |
| 104 | Camp Borden, Canada | Sep. 1962 | 3 |
| 105 | San Diego, California | Feb. 1963 | |
| 106 | Esquimalt, British Columbia, Canada | Jun. 1963 | |

*Thank you to Maria-Otilia Nagy for transcribing this appendix.

Appendix D

Membership of the Canada-United States Permanent Joint Board on Defence, 1940-1963⁵⁵¹

Canadian Section

ROYAL CANADIAN NAVY

| | |
|------------------|-----------------|
| Capt LW Murray | Aug 40 - Dec 40 |
| Capt HE Reid | Dec 40 - Oct 42 |
| R/ADM GC Jones | Oct 42 - Mar 46 |
| CMDR HG DeWolf | Mar 46 - Feb 47 |
| CMDR FL Houghton | Feb 47 - Jun 51 |
| R/ADM HG DeWolf | Jun 51 - Apr 53 |
| R/ADM WB Creery | Apr 53 - Oct 54 |
| R/ADM HN Lay | Oct 54 - Jan 58 |
| R/ADM EP Tisdall | Jan 58 - Jul 61 |
| B/ADM JV Brock | Jul 61 - ? |

CANADIAN ARMY

| | |
|------------------------|------------------|
| Brig K Stuart | Aug 40 - Apr 41 |
| Lt Col GP Vanier | Oct 40 - Dec 42 |
| Maj-Gen M Pope | Apr 41 - Nov 45 |
| Maj-Gen HFG Letson | Nov 45 - Mar 46 |
| Maj-Gen DC Spry | Mar 46 - Sept 46 |
| Maj-Gen Churchill Mann | Sept 46 - Dec 48 |
| Maj-Gen HD Graham | Dec 48 - Jun 51 |
| Maj-Gen HA Sparling | Jun 51 - Jan 56 |
| Maj-Gen NE Rodger | Jan 56 - Sept 56 |
| Maj-Gen G Kitching | Sep 56 - Jan 58 |
| Maj-Gen JV Allard | Jan 58 - Sept 61 |
| Maj-Gen JPE Bernatchez | Sept 61 - ? |

ROYAL CANADIAN AIR FORCE

| | |
|-------------------|-----------------|
| A/C AAL Cuffe | Aug 40 - Jan 42 |
| G/C FV Heakes | Jan 42 - Dec 42 |
| A/V/M NB Anderson | Dec 42 - Feb 44 |
| A/V/M WA Curtis | Feb 44 - Nov 47 |
| A/V/M AL Mortee | Nov 47 - Dec 48 |
| A/V/M CR Dunlap | Dec 48 - Jan 50 |
| A/V/M AL James | Jan 50 - Aug 51 |
| A/V/M FR Miller | Aug 51 - Oct 54 |
| A/V/M CR Dunlap | Oct 54 - Jul 58 |

⁵⁵¹ Beatty, *The Canada-United States Permanent Joint Board on Defense*, Appendix B.

A/V/M DM Smith Jul 58 - Jan 63
A/V/M CL Annis Jan 63 - ?

DEPARTMENT OF EXTERNAL AFFAIRS

*(M denotes Member, S denotes Secretary)

Mr. HL Keenleyside Aug 40 - Sept 45
Mr. RM MacDonnell Sept 45 - Feb 47
Mr. SF Rae Feb 47 - Sept 47
Mr. David Johnson Sept 47 - Dec 48
Mr. CC Eberts Dec 48 - Jan 51
Mr. RA Mackay (M) Jan 51 - Oct 55
Mr. RAJ Philips (S) Jan 51 - Aug 51
Mr. WH Barton (S) Aug 51 - Jan 57
Mr. RM McDonnell (M) Oct 55 - Jan 58
Mr. JJ McCardle (S) Jan 57 - Jan 60
Mr. P Tremblay (M) Jan 58 - Jan 60
Mr. WH Barton (M) Jan 60 - Sep 61
Mr. F Tovell (S) Jan 60 - May 62
Mr. LAD Stephens (M) Sep 61 - Apr 62
Mr. AR Menzies (M) Apr 62 - ?
Mr. JS Nutt (S) May 62 - ?

United States Section

UNITED STATES ARMY

Lt-Gen SD Embick Aug 40 - Nov 42
Maj-Gen JP Smith Nov 42 - Dec 42
Maj-Gen GV Henry Dec 42 - Nov 47
Maj-Gen WH Arnold Nov 47 - Jun 48
Maj-Gen Roy T Maddocks June 48 - Dec 48
Maj-Gen CL Bolte Dec 48 - May 50
Maj-Gen WR Schmidt May 50 - Nov 51
Maj-Gen JL McKee Nov 51 - Apr 53
Maj-Gen FA Allen Apr 53 - Oct 54
Maj-Gen PD Harkins Oct 54 - Oct 55
Maj-Gen R Vittrup Oct 55 - Sept 56
Maj-Gen TJH Trapnell Sept 56 - Jun 58
Maj-Gen JC Oakes Jun 58 - Oct 58
Maj-Gen EG Farrand Oct 58 - Apr 60
Maj-Gen HH Fischer Apr 60 - ?
Maj-Gen JD Alger ? - ?

UNITED STATES NAVY

Capt HW Hill Aug 40 - Feb 42
Capt FP Thomas Feb 42 - Feb 43
V/ADM AW Johnson Feb 43 - Aug 45

| | |
|----------------------|-------------------|
| V/ADM DW Bagley | Aug 45 - Mar 46 |
| R/ADM RE Schuir Mann | Mar 46 - Sept 46 |
| R/ADM J Cary Jones | Sept 46 - Sept 47 |
| R/ADM CW Styer | Sept 47 - Jun 48 |
| R/ADM CB Monsen | Jun 48 - Aug 48 |
| R/ADM Ruthven E Libb | Aug 48 - Jun 51 |
| R/ADM ME Miles | Jun 51 - Jul 54 |
| R/ADM CW Wilkins | Jul 54 - Apr 57 |
| R/ADM WF Petersen | Apr 57 - Oct 58 |
| R/ADM HM Briggs | Oct 58 - ? |
| R/ADM GH Wales | ? - ? |

UNITED STATES ARMY (AIR)

| | |
|-----------------------|------------------|
| Lt-Col JT McNarney | Aug 40 - Sept 40 |
| Lt-Col C Bissell | Sept 40 - Feb 42 |
| Lt-Col RW Douglas, JR | Feb 42 - Feb 43 |
| Lt-Col EW Hockenberry | Feb 43 - Dec 44 |
| Col CH Deerwester | Dec 44 - Nov 47 |

UNITED STATES NAVY (AIR)

| | |
|-----------------------|-----------------|
| CDR FP Sherman | Aug 40 - May 42 |
| Capt FD Wagner | May 42 - Feb 43 |
| Capt JP Whitney | Feb 43 - Nov 43 |
| Capt RW Ruble | Nov 43 - May 45 |
| Capt TP Jeter | May 45 - Nov 45 |
| Capt Felix L Baker | Nov 45 - Mar 60 |
| R/ADM Marshall Greer | Mar 46 - Feb 47 |
| Capt GW Anderson, JR. | Feb 47 - Nov 47 |

UNITED STATES AIR FORCE

| | |
|--------------------------|-----------------|
| Maj-Gen St Clair Street | Nov 47 - Feb 48 |
| Maj-Gen Emmett O'Donnell | Feb 48 - Dec 48 |
| Maj-Gen RL Walsh | Dec 48 - Apr 53 |
| Maj-Gen RM Webster | Apr 53 - Jul 54 |
| Maj-Gen JE Briggs | Jul 54 - Jul 56 |
| Maj-Gen GA Blake | Jul 56 - Apr 57 |
| Maj-Gen MS Roth | Apr 57 - Jul 57 |
| Maj-Gen TC Daroy | Jul 57 - ? |
| Maj-Gen J Gough | ? - ? |

DEPARTMENT OF STATE

*(M denotes Member, S denotes Secretary)

| | |
|----------------------|-----------------|
| Mr. JD Hickerson | Aug 40 - Nov 45 |
| Mr. J Graham Parsons | Nov 45 - Feb 47 |
| Mr. Andrew B Foster | Feb 47 - Aug 48 |
| Mr. William P Snow | Aug 48 - Oct 50 |

| | |
|--------------------------|-----------------|
| Mr. HM Benninghoff (M) | Oct 50 - May 51 |
| Mr. WL Wight (S) | Jan 51 - Jan 55 |
| Mr. NS Haselton (M) | May 51 - Jun 52 |
| Mr. AF Petersen (M) | Jun 52 - Sep 53 |
| Mr. O Horsey (M) | Sep 53 - Apr 55 |
| Mr. JL Nugent (S) | Jan 55 - Jul 56 |
| Mr. RG Miner (M) | Apr 55 - Jul 56 |
| Mr. JL Nugent (M) | Jul 55 - Oct 58 |
| Mr. JP Parker (S) | Jul 56 - Apr 60 |
| Mr. W Willoughby (M) | Oct 58 - ? |
| Mr. H Burgess (S) | Apr 60 - ? |
| Mr. Willis Armstrong (M) | ? - ? |
| Mr. WD Hubbard (S) | ? - Oct 63 |
| Mr. RJ Barrett (S) | Oct 63 - ? |

Appendix E

Short Table of Recommendations of the Canada-United States Permanent Joint Board on Defence, 26 August 1940 -1964

| Recommendation Number | Topic | Meeting Date |
|-----------------------|---------------------------------------------------------|---------------------|
| 1 | Exchange of Information | 26 August 1940 |
| 2 | Defence of Newfoundland | 27 August 1940 |
| 3 | Defence of Newfoundland | 27 August 1940 |
| 4 | Allotment of Materials | 27 August 1940 |
| 5 | Improving Communications in the Northeast | 27 August 1940 |
| 6 | Production Data | 27 August 1940 |
| 7 | Joint Defence Plan | 27 August 1940 |
| 8 | Defense of Newfoundland | 11 September 1940 |
| 9 | German Prisoners | 4 October 1940 |
| 10 | Air Staging Facilities – Western Canada | 14 November 1940 |
| 11 | Ucluelet Airdrome (Vancouver Island) | 15 November 1940 |
| 12 | War Industry Member | 17 December 1940 |
| 13 | Sault Ste. Marie | 20 January 1941 |
| 14 | United States Air Units for Newfoundland | 21 January 1941 |
| 15 | Newfoundland Fuel Storage | 16 April 1941 |
| 16 | Rehabilitation of the Newfoundland Railroad | 17 April 1941 |
| 17 | Northwest River Landing Field | 29 July 1941 |
| 18 | Underwater Defences for Argentia | 29 July 1941 |
| 19 | Canadian-Alaskan Staging Fields | 29 July 1941 |
| 20 | Newfoundland Roads | 30 July 1941 |
| 21 | Maintenance of Facilities | 10 November 1941 |
| 22 | Decentralization of Functions to Local Commanders | 20 December 1941 |
| 23 | Co-ordination of Aviation Training Program | 20 December 1941 |
| 24 | Military Highway to Alaska | 26 February 1942 |
| 25 | Defence of Sault Ste. Marie Against Air Attack | 25-26 February 1942 |
| 26 | Northeast Short-Range Ferry Routes to United Kingdom | 9 June 1942 |
| 27 | Flow of Materials to Canada | 6 July 1942 |

| | | |
|------|------------------------------------------------------------------------------------------------|--------------------|
| 28 | Postwar Disposition of U.S. Projects in Canada | 13 January 1943 |
| 29 | United States-Alaska Air Route | 24 February 1943 |
| 30 | Use of Non-Rigid Airships, Eastern Canadian Waters | 1-2 April 1943 |
| 31 | Maintenance and Control of Airdromes | 6-7 May 1943 |
| 32 | Maintenance and Control of Facilities | 24-25 August 1943 |
| 33 | Postwar Dispositions of U.S. Projects in Canada | 6-7 September 1944 |
| 34 | PJBD's use in-perpetuity | April 1946 |
| 35 | PJBD's use in-perpetuity | April 1946 |
| 36 | PJBD's use in-perpetuity | 20 November 1946 |
| 47/1 | Reciprocal Transportation | 1947 |
| 48/1 | St. Lawrence Seaway | 1948 |
| 48/2 | Canadian Materiel Purchase from the United States | 1948 |
| 49/1 | Benefits of Economic Trade of Military Equipment | 1949 |
| 50/1 | Administrative Functions for US troops in Newfoundland | 1950 |
| 51/1 | Extension of the Pinetree Line | 1951 |
| 51/2 | St. Lawrence Seaway | 1951 |
| 51/3 | Combined Air Defence Training Exercises | 1951 |
| 51/4 | Interception of Unidentified Aircraft | 1951 |
| 51/5 | Regulations for cross-Border Aircraft | 1951 |
| 51/6 | Mutual Reinforcement in a Tactical Situation | 1951 |
| 52/1 | Transit of Territorial Waters | 1952 |
| 52/2 | Regulations for private maritime operators | 1952 |
| 53/1 | Engagement of Unidentified Aircraft (The NORAD Recommendation) | 1953 |
| 64/1 | Unknown – <i>inferred</i> that it regards the placement of US nuclear weapons on Canadian soil | 1964 |

Appendix F

The Ogdensburg Agreement⁵⁵²

THE WHITE HOUSE

FOR THE PRESS

August 18, 1940

The following joint statement of the President and the Prime Minister of Canada, Mackenzie King, is released for papers appearing on the street not earlier than 9 O'clock P.M., Eastern Standard Time, today, August 18th, 1940. The same limitation applies to use by radio broadcasters or radio news commentators.

William D. Hassett

The Prime Minister and the President have discussed the mutual problems of defense in relation to the safety of Canada and the United States.

It has been agreed that a Permanent Joint Board on Defense shall be set up at once by the two countries.

This Permanent Joint Board on Defense shall commence immediate studies relating to sea, land, and air problems including personnel and material.

It will consider in the broad sense the defense of the north half of the Western Hemisphere.

The Permanent Joint Board on Defense will consist of four or five Members from each country, most of them from the Services. It will meet shortly.

NOTE: This release constitutes what is commonly referred to as the "OGDENSBURG AGREEMENT".

⁵⁵² Franklin D. Roosevelt, "The Great Communicator": The Master Speech Files, 1898, 1910-1945 File No. 1168 (August 18, 1938) Kingston, Ontario, Canada - Address at Queens University: 4.