

# **Future Reserves 2020**

The Independent Commission to Review  
the United Kingdom's Reserve Forces



**July 2011**  
**London**

**Front Cover: Lance Corporal Martin Goodright LONDONS  
Afghanistan 2010**

# The Independent Commission to Review the United Kingdom's Reserve Forces

**Commission's Vision for the Reserve Forces in 2020:** A Reserve Force that is an integral element of the Whole Force; that is optimised to deliver assured capability across all military tasks on operations at home and abroad; that harnesses for Defence the widest pool of talent in the UK; and that upholds the volunteer ethos. A force for good in the community, that effectively represents both Defence and Society; and that is sustained by formal governance safeguards and an appropriately resourced and equitable Reserve Proposition.

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# Contents

Foreword	4
Summary of Major Conclusions and Recommendations	6
Conclusions	6
Recommendations	7
<b>Section 1 Context: The Case for Change</b>	<b>8</b>
Introduction	8
Security	9
Societal	10
Financial	11
Current State of Reserves	11
Maritime Reserves	13
Territorial Army	14
RAF Reserve	18
Special Forces	19
Defence Medical Services (DMS)	19
International Comparison	21
Summary	23
<b>Section 2 Taking the Reserves Forward: An Outline Plan for the Future</b>	<b>24</b>
Stage 1: Investment and Betterment	25
Stage 2: Enabling the Future	31
Stage 3: Realising the Potential	35
<b>Section 3: Transforming the Reserves: Factors Affecting Implementation</b>	<b>38</b>
Introduction	38
Implementation	39
National Security Council Considerations	39
Costs	40
Governance	42
Integration and the Whole Force Concept	43
<b>Annex A to FR20 Final Report</b>	<b>45</b>
Summary of Wider Recommendations	45

<b>Annex B to FR20 Final Report</b>	<b>48</b>
Outline Cost of Betterment and Enablement	48
<b>Annex C to FR20 Final Report</b>	<b>50</b>
Recommendations by Environment	50
Royal Navy	50
Army	52
RAF	53
Special Forces	54
Defence Medical Services	54
<b>Annex D to FR20 Final Report</b>	<b>56</b>
International Dimension	56
<b>Annex E to FR20 Final Report</b>	<b>64</b>
Acknowledgements	64





# Foreword

When the Prime Minister announced the outcome of the Strategic Defence and Security Review to the House of Commons in October 2011 he commissioned a separate Review of the Reserve Forces. He did so because he questioned whether or not the balance between our Regular and Reserve Forces was the right one and whether or not, in the context of modern threats and modern skills, we made optimum use of our Reservists and the volunteer ethos of our society. The Review was timely, indeed it was probably overdue, since we have recently witnessed a significant decline in the size of our Reserve Forces such that the very viability of some elements of them is questionable. Our Commission has now completed its work and this report represents a summary of our findings and recommendations.

The work of the Commission has been stimulating, enjoyable and challenging and has drawn on inputs from the widest possible sources. From the very outset we have been keen to ensure that the outcome of our work would be of benefit to Defence, National Security and Society in the widest possible way. Specifically, given the Prime Minister's remit, we were guided by the desire to meet four requirements:

- First, that the overall capability and utility of our Armed Forces would be enhanced.
- Second, that Defence would better harness the talents and the volunteer ethos of the country.
- Third, that the Armed Forces would become better integrated with and understood by the society from which they draw their people.
- Fourth, that Defence would become more cost effective to run.

Our Commission has concluded that the UK's Reserve Forces are in need of significant revitalisation and re-orientation. Although continuing to do a remarkable job in many areas, for example as part of the Defence Medical Services and in providing individual augmentation for operations, the wider picture is one of relative neglect and decline. By both our own historic standards and by current international comparison our Reserves form too small a part of our overall national military capability. As a result we are failing to harness the volunteer ethos of society and to access the best talent that the country has available. More widely we are missing an opportunity to create a reserve for domestic resilience, homeland security and military regeneration. And the result is a less robust force structure, a potentially less cost-effective manpower balance across the Armed Forces and an erosion of the vital links



our Armed Forces must maintain with society. Our Commission therefore recommends the immediate need for resources to be committed to stabilise and then improve the state of the Reserve; and for concurrent action to create the policy, legal and administrative frameworks to increase the size of the Reserve in the future. Thereafter we recommend consideration of wider roles for the Reserve and a potentially significant shift in the Regular:Reserve balance.

One of our principal conclusions is the need to treat the various human elements of Defence capability as an integrated whole. Within this unifying idea, our view is that the Reservist element of the Armed Forces must grow to become a far greater proportion of overall Service manpower; that the Reservist element must become more integrated within the overall Force Structure; that the roles of the Reservists must expand to include such tasks as stabilisation, cyber, civil contingency and wider regeneration; and that Reservists must no longer simply be used as individual specialists and augmentees, but as formed units and sub-units.

A shift in the Regular:Reserve balance is recommended as being in the interests of national security and the overall resilience, utility and sustainability of the Armed Forces: though it is not without risk and will need political conviction and legislative change to deliver. The Commission recognises that, if the Reserves are going to become an essential and integrated element of the Whole Force Structure, then their availability and quality has to be guaranteed. Such a guarantee will require a significant change in mind-set and a change in the nature of the bargain between the Government, the country and its Reserves. This bargain will need to be based on: a much better proposition to our Reservists in respect of their training, career progression and command and leadership opportunities; a change in legislation to allow for the more routine mobilisation of Reserves outwith combat operations; better employer support and greater employment protection; and better methods to partner, twin and integrate the Regular and Reserve components. But the Reserves will also need to become more efficient in the way they are trained and mobilised; though it is also our recommendation that the Reserves must retain a well dispersed national footprint, such that they are able to connect effectively with the nation.

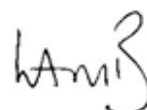
In carrying out our work the Commission has consulted very widely; we have tested our findings against comparator nations; and we have enjoyed excellent support from the staff of the Ministry of Defence. We believe that most of what our report has to say will be welcomed by the Armed Forces; but our findings and recommendations are wholly our own. Moreover, some of our recommendations involve quite fundamental change and are not without risk. So we recognise that our report will need wide Government consideration, specifically by the National Security Council, and a measured and progressive implementation plan thereafter. Such is the fragile state of some elements of our Reserve Forces that resources and action are required immediately to arrest their decline; but the wider vision of our Review will take several years to realise.



General Sir Nicholas Houghton



Julian Brazier MP



Lieutenant General (Retired) Sir Graeme Lamb

# Summary of Major Conclusions and Recommendations

## Conclusions

The Commission has reached four broad conclusions, all of which support the need for change and early action:

**Our Reserve Forces are in Decline.** By our national historic standards and by comparison with other nations our Reserves form too small a part of our overall national military capability. The Proposition we currently offer our Reservists has declined; the opportunities for individual and collective training have reduced; the prospects for promotion and command opportunity are less. The offer that we make is ceasing to attract a sustainable Reserve; and the demands of individual augmentation for operations have accelerated the institutional decline of our Reserve Forces.

**We have failed to modernise Reservist Roles.** The purpose for which we hold Reserves and the roles to which we attribute them, have not been updated to match the demands of the new security environment. For example the Territorial Army is still structured for large scale intervention operations. We have not fully re-assessed the utility of Reserves in the context of Homeland Security, UK Resilience, wider specialist capabilities such as stabilisation and cyber, and as a formal mechanism for regeneration.

**We are not exploiting the potential of our Reserves.** We are not fully harnessing the volunteer ethos of society or exploiting the best talent the country has to offer. We are denying the opportunity to adopt a far more cost-effective manpower balance across the Armed Forces. And, by failing to exploit the Reserves more fully, we are contributing to an erosion of the links between our Armed Forces and wider society.

**We are not using the Reserves efficiently.** We are not using our Reserves in the most cost-effective manner. The Reserve estate needs rationalisation, the training overheads need optimisation and Reserve units need better mechanisms to partner with the Regular component. The force generation of the Reserve component needs to be done more efficiently, with a greater guarantee of quality and a surer knowledge of availability.

Notwithstanding these sobering conclusions, the Commission fully recognises the remarkable contribution that our Reserve Forces continue to make to operations. Indeed the outstanding acts of individual and collective service, particularly on recent operations in Iraq and Afghanistan, show that, despite the true and worrying condition of our Reserve Forces, their potential remains invaluable.

# Recommendations

In the context of our major conclusions, the following recommendations are made:

**Stabilisation and Betterment.** Resources are needed immediately to arrest the severe decline in the state of the Reserves. Included in this is the need for a revised Proposition which provides the challenge and reward that makes Reserve service worthwhile and sustainable. This will require enhancements to individual, collective and command training. It will also require increased command opportunities, in peacetime and on operations. The Reserve will require new roles, more viable structures and better mechanisms to integrate with the Regular component. We estimate that a betterment package, when coupled with the need to abate other savings measures against Reserves, will cost £590M over four years.

**Revised Roles.** The National Security Council should examine the breadth of roles which Reservists undertake. We recommend that Reservists should play a greater part in Homeland Security (for example maritime coastal protection) and UK Resilience. We are not advocating a third force, rather that Reserves should have a more formal role in support of specific security tasks and their local civil communities. More widely, specialist tasks should expand, specifically in areas such as cyber, stabilisation and medical roles in humanitarian crises. Beyond individual operational augmentation, Reserves should be able to meet some operational tasks as formed sub-units and units. And our Reserves must form the framework around which military regeneration can be effected.

**Enablement.** The availability of a larger and more usable Reserve has to be guaranteed. Such a guarantee has to be underpinned by legislative changes which permit greater ease of mobilisation, better employee protection and greater recognition of employers, perhaps through a nationally endorsed Kitemark. We should exploit the potential for innovative partnerships between Defence, Education and Industry to optimise the sharing and development of human talent. And we need modern administrative systems for enlistment, processing and transfer between the Regular forces and the Reserves.

**Adjusting the Regular: Reserve Balance.** Defence should adopt a Whole Force Concept which optimises the most cost-effective balance of Regular, Reserve, Contractor and Civilian manpower. Within this, the Reserve element should proportionately increase. By 2015, the trained strength of the Reserves should be: Royal Navy Reserves/Royal Marine Reserves 3,100; Territorial Army 30,000 and Royal Auxiliary Air Force 1,800. Thereafter the size of the Reservist component should increase further to maximise the cost effectiveness of having a larger Reserve component within the Whole Force. The Commission's view is that, in the future, the trained strength of the Army – Regular and Reserve – should be about 120,000.

**Force Generation.** In order to improve the efficiency of Force Generation, the Reserve estate should be rationalised in a way that is sensitive to maintaining geographically dispersed local links whilst providing access to training. Once we have rebuilt the officer and non commissioned officer structures, and in the context of more effective Regular:Reserve twinning, the requirements for Regular Permanent Training Staff should be reviewed. And the overall Force Generation ratio within the TA should be optimised so that, if required, a 1:8 ratio of mobilised to non-mobilised Reservists could be sustained.

**Governance.** A revised governance structure for the Reserve is recommended to: first, oversee the implementation of recommendations arising from this Review; second, to provide an independent mechanism to report to the Ministry of Defence and Parliament on the state of the Reserves; and third, to help ensure the appropriate influence of certain Reserve appointments.

The Commission believes that, if these recommendations are carried through, then the overall capability, utility and resilience of our Armed Forces will be enhanced, in a way that meets the security, financial and societal challenges of the day, and in a way that maintains continuity with historic British practice.



# Section 1

## Context: The Case for Change

### Introduction

1. The need for an integrated Reserve Force to complement a full-time Regular Force, was reaffirmed in the Strategic Defence and Security Review (SDSR) 2010: *“Reserve Forces will contribute to each element of the future force.”*<sup>1</sup> The prima facie issue for the Commission is, therefore, not whether to have Reserve Forces, but how they should most effectively contribute to the Armed Forces in light of the strategic context.
2. Against the strategic context set out below, the Commission has examined whether the Reserve Forces are properly structured to make the most efficient use of their skills, experience and capabilities. The Commission has sought to re-shape the Volunteer Reserves for each Service by developing innovative ideas to harness the Nation’s talent more cost-effectively. In the main, this has been done through the vehicle of the Whole Force Concept, which we believe will provide much greater agility and flexibility, as well as the unifying thread that will enhance the Armed Forces’ capability and deliver cost effective manpower for Defence in the future.

#### **The Whole Force Concept:**

The Whole Force Concept seeks to ensure that Defence is supported by the most sustainable, effective, integrated and affordable balance of regular military personnel, reservists, Ministry of Defence civilians and contractors. *(Derived from Recommendation 11, the Defence Reform Review, June 2011).*

3. This Study offers a generational opportunity to make much needed changes to the UK’s Reserve Forces. We believe that our proposals are logical, transparent and, where possible, have been based upon the clear operational requirement laid down in the SDSR.

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1. HM Cabinet Office (2010) *Securing Britain in an Age of Uncertainty: The Strategic Defence and Security Review*, page 20.

4. In this section we review emerging changes to the current strategic environment in three principal contexts: security, societal and financial. This is then supported by an analysis of the current state of the Reserves, and by a comparison of the ways in which our international colleagues manage their Reserves. The Commission believes that this section confirms that there is a pressing case for change to the UK's Reserves, in particular the Territorial Army (TA).

## Security

5. Thirty years ago the Armed Forces were designed to fight a conventional war of national survival. The principal role of the Reserve Forces was to provide mass reinforcements to help counter the Soviet threat. However, there was little political appetite for mobilising them for any other contingency: for example, Reserve units were not mobilised for either the Falklands Conflict or to support the Civil Power in Northern Ireland. Following the end of the Cold War, however, the reduction in size of the Regular Forces led to an increasing use of Reserves in operations such as those in the Balkans, Iraq, Afghanistan and now Libya.
6. Concurrently, the terrorist attacks in New York, Madrid, London and Mumbai, flooding in Cumbria, and the global financial crisis have highlighted that the environment is now highly volatile, uncertain and in constant flux. Even in the 9 months since the SDSR we have witnessed: the 'Arab Spring', the devastating Japanese tsunami (coupled with the Fukushima nuclear incident), an increase in tension in Northern Ireland and the Libyan crisis.
7. Cumulatively, this represents a significant shift in the strategic context over the last three decades, in turn demanding a corresponding change in the way we organise, train and equip our Armed Forces – Regular and Reserve – in order to meet these new challenges. This context was largely set out in the 2010 National Security Strategy which calls for *“a radical transformation in the way we think about national security and organise ourselves to protect it”*<sup>2</sup>. In turn, the SDSR sought to address this uncertainty by developing the concept of an 'adaptable' response, coupled with the need to collaboratively build regional capacity overseas, in areas of critical strategic interest to the UK, to prevent further crises and conflicts. To some extent, the SDSR only started to address the implications of the National Security Strategy. This was particularly evident in the areas of improved cross-Government approaches, wider attraction of national talent and the need to be able to expand capacity quickly in this uncertain environment so as to react to unexpected threats effectively.
8. The strategic security context described in SDSR, in which there is no current conventional military threat to the UK, argues for an ability to take risk against holding large scale military capability at high readiness. Furthermore, specific security needs, such as increased employment of specialists capable of helping a nation to rebuild its governance and infrastructure, linguists and cyber experts demand ready access to a wider set of skills than have routinely sat in our Regular forces. Similarly, potential domestic threats – whether from terrorism or natural disaster – argue for the ability to call on both specialist military capabilities and a disciplined cohort of second-responders that could sustain

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2. HM Cabinet Office (2010), *A Strong Britain in an Age of Uncertainty: The National Security Strategy*, page 3. Reinforced by the Rt Hon Dr Liam Fox (Secretary of State for Defence) on 19 May 11, (Chatham House): *“The Strategic Defence and Security Review has ensured that we will remain in the premier league of military powers. It is not an agenda for retrenchment, it’s an ambitious agenda for transformation over time.”*

the national response to such incidents. The Commission believes that now is the time to anchor the Reserves much more firmly to a set of clear operational requirements in response to the spectrum of potential threats. The definition of this requirement will then enable the detail of Reserve Force numbers and their basing requirements to be refined.

## Societal

9. The societal context is equally complex. The reduction in the size and footprint of the Regular Forces has made them more remote from British society. Arguably most of British society has never been more supportive of its Armed Forces than it is now. But that support is borne more out of sympathy than understanding; and the links between a rapidly changing society and an ever smaller and more professional military are eroding.
10. Cohesion between what is referred to as the *Clausewitzian Trinity* of Government, Armed Forces and Society<sup>3</sup>, has been weakened by misunderstanding over the UK's involvement in unpopular conflicts, and the absence of an existential threat. The Commission's work has shown that this is not unique to the UK, as our closest allies have faced similar problems. In the US, the 'Abrams' Doctrine'<sup>4</sup>, also developed at a time of significant fiscal pressure, rebalanced capabilities into their Reserves. This means that the US Government has to more fully engage the American public before being able to use military force. In the UK, a revised National Security/Defence strategic narrative should be developed, to re-establish popular understanding of Defence and the rationale for the Nation's Reserves.
11. Reserves should play a key role in delivering this narrative. With their community base, wide footprint and local influence, Reserves offer a conduit for representing Defence interests. With the Government's 'Big Society' initiative giving prominence to the need for citizens to volunteer, the Reserve Forces also have an opportunity to provide an outlet for newly engaged volunteers. Response in support of civil contingencies is an important area where localism, volunteering and the Defence narrative could be substantiated by visible, positive Reservist action. This role is seen as central to Community and Employer support in our principal allied nations.
12. Society has changed radically over the last 30 years: it is older; it is more diverse; it is more urban-based, but with marked regional differences. The workforce has more graduates and fewer in manufacturing, and more people are electing for a portfolio career, rather than staying with a single employer throughout their working life. Defence will have to shape its Regular and Reserve recruitment strategies to match this changing manpower pool, its expectations and the competition from other employers and volunteering opportunities. However, these changes to the social environment offer Defence the opportunity to successfully develop and implement the Whole Force Concept.

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3. von Clausewitz, C. (1989), *On War*. Princeton University Press. London, page 89.

4. General Creighton Abrams, Chief of Staff US Army, 1972-1974.

## Financial

13. The Secretary of State for Defence has rightly highlighted<sup>5</sup> that sustainable military power depends on a sound economic base. Given the challenging financial pressures on the UK, there is a real risk that the Armed Forces will be unable to meet the full range of tasks demanded, unless more cost-effective ways of generating the capabilities required are found. The manpower element of the Defence budget currently accounts for over 30% of overall costs and the size of our Regular force structure is unsustainable on current financial projections of the future Defence Budget. Thus, there remains a financial imperative for Defence to deliver its manpower more effectively to avoid further unwelcome squeezing of the equipment and support budgets, without any significant decrease in output.
14. The Armed Forces are currently unable to flex manpower in a responsive way and are not accessing the full range of talent within society. In broad terms, our analysis has revealed that a TA unit, of comparable size to its Regular counterpart, costs about 20% of the latter's manpower bill when not mobilised. When mobilised, the same unit costs some 10-15% less than a Regular one. Any assumptions about savings and cost-effectiveness are therefore critically sensitive to the rate of use that is assumed over a given period – the more Reservists are used, the less cost benefits are derived from them – and the assumed force generation factor.
15. The Commission has identified two initiatives to help maximise affordability and talent whilst retaining capability. The first is to consider greater use of non-Regular manpower through adoption of a Whole Force Concept. This approach is now the standard among our principal allies, notably the USA and Canada. If risks regarding the quality and guaranteed availability of the Reserve element can be satisfactorily mitigated, a re-balanced force offers the prospect of financial savings without detriment to our National Security. The second initiative is to place some capability at lower readiness, ie move whole units/capabilities to the Reserves.
16. The current Volunteer Estate used by both Reserve and Cadet forces is widely dispersed and scaled against a TA requirement based on Defence assumptions from at least 30 years ago. Given the immense financial pressure on the Defence budget, there was an expectation in the SDSR that this estate would be rationalised. This was reflected in a range of anticipated capital receipts. Nevertheless, we are mindful of the fact that while a unit can easily be moved on paper, it is not so easy in practice. If we want the Reserves to link with society, and to contribute locally to UK Resilience, we need to be sensitive to how estate rationalisation is effected.

## Current State of Reserves

17. Over the last 20 years the Reserves have been widely used and, as befits a high quality military reserve, have undertaken a wide variety of roles. They have provided a de facto strategic reserve, additional capacity for large scale conventional operations, and support to enduring operations, as well as filling vital specialist roles and supporting some UK domestic operations. At the peak in 2004, Reservists made up 20% of our forces in Iraq and 12% in Afghanistan. A number have been decorated and 27 have given their lives. A

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5. Rt Hon Dr Liam Fox, *op cit*.

small number of formed sub-units have been deployed in Bosnia, Iraq and Afghanistan and continued to be so until 2009.

### Case Study 1 – Nuclear Biological and Chemical (NBC) Protection Gulf War 2:

The Royal Yeomanry (RY) mobilised Regimental Headquarters (RHQ) and two sub-units in support of the UK's CBRN counter-measures for Operation TELIC. Royal Yeomanry's standing mission had been to provide force elements at 180 days' notice. In practice, in early December 2002, the Commanding Officer, who was a Territorial, received a warning order, and personnel received mobilisation papers on 4 January 2003, ordering them to report for duty on 1 February. After two weeks at Chilwell, RHQ deployed to theatre on 13 February, with the remainder of the regiment carrying out pre-deployment training and arriving in Iraq on 3 March less than 90 days after the original warning order. In theatre the two squadrons formed a composite squadron, which became Y Squadron of the Joint NBC Regiment. During the war-fighting phase of the operation they had responsibility for NBC support to 1 (UK) Armoured Division's rear area and 3 Commando Brigade; Y Squadron, also commanded by a Territorial, had by the time of initial hostilities been re-organised to take Regular components of the Jt NBC Regiment under command. RHQ were detached from 1 (UK) Armoured Division to the US 75th Exploitation Task Force (75 XTF) and Coalition Force Land Component Command (CFLCC) to act as the liaison between the UK and US NBC efforts throughout the theatre of operations. On cessation of the war-fighting phase, Y Sqn reverted to Operational Command (OPCOM) Royal Yeomanry and took up Peace Support Operations to the North of Al-Qurnah following a relief-in-place with elements of 16 Air Assault Brigade. By virtue of deploying the Regimental HQ and 2 sub-units under command, the Royal Yeomanry were awarded the battle honour 'Iraq 2003'.

Since the introduction of the Reserve Forces Act 1996, there have been around 30,000 Reservist mobilisations mostly as individual augmentees or specialists, and less frequently as formed bodies – usually sub-units. The invaluable contributions made by these Reservists are an irrefutable testament to their continued utility.

18. However, individual examples of outstanding Reserve service defy any wholly accurate generalisation of the state of the Reserves today. In the Commission's view, this operational contribution has often been in spite of, and not because of, the structure, funding and perception of the Reserves. Certain worrying trends are clearly discernable, predominantly in the TA, but to varying degrees they characterise all the Reserves:
  - a. First, the overall size of the Reserve component has been steadily reducing – both in absolute terms and as a proportion of the overall force structure. For example, the TA was 76,000<sup>6</sup> strong in 1990, yet some estimates put its trained and active strength as low as 14,000 today.
  - b. Second, the Reserve component is getting older. The Regular Army is a predominantly young force, under the age of 30; not so the TA. This is particularly true of the officer ranks, the majority of whom are over 40. The ability to attract and retain young officers is one of the greatest concerns of all our Reserve Forces.
  - c. Third, the overall Reservist Proposition has markedly declined. This is manifest in many ways: a failure to resource recruiting and good training, especially collective training; to offer career progression; to update operational roles; to permit deployment in formed sub-units and therefore offer command opportunities. Such factors have been

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6. In 1990 there were a total of 76,000 Volunteer Reserves in the Army. This figure includes Officer Training Corps and Non-Regular Permanent Staff, but excludes R IRISH Home Service Force. Source: MOD UK Defence Statistics 2008 (a National Statistics Publication) issued in Dec 2008.



compounded by the imposition of recruiting ceilings and greatly reduced activity and marketing budgets. The net result is a Reserve of declining morale, uncertain as to its role and the fairness of the Proposition it is offered.

#### The Existing Proposition:

“Defence will offer the challenge and reward which attracts people to volunteer, and undertakes to train and support them throughout their Service, including when mobilised and recuperating.” (*Strategic Review of Reserves, 2009, page 1-3*).

19. A combination of circumstances has brought about the decline in the overall health of the Reserves. Financial pressures on Defence at a time of significant operational commitment, have led to an overall reduction in the resources dedicated to the Reserves, with the wider utility and sustainability of Reserves being neglected in the context of more immediate priorities. Similarly, the increasing tendency to use the TA primarily as a source of individual augmentees is due in part to the end of the Iraq commitment, with Defence now operating within planning assumptions, combined with the view that the standard of collective training required for operations in Afghanistan is so high that it is deemed impossible for UK Reserve sub-units to achieve within a 12 month mobilisation window. The funding assigned to pay for Man Training Days, primarily for the TA has been seen as ‘uncommitted’ cash and has frequently been used to help ‘balance the books’ during difficult financial years. This has significantly eroded the trust that must exist between the Regular and Reserve components of our Armed Forces and is one of the critical issues which must be addressed.

## Maritime Reserves

20. The Maritime Reserves combine the Royal Naval Reserve (RNR) and Royal Marines Reserve (RMR) and its role is to augment the RN and RM. The RNR has 14 shore establishments, all but one commanded by a Reservist. The RMR is based around 5 Headquarters and 24 detachments with each Headquarters commanded by a Regular or Reservist. Together, the Maritime Reserve has a dispersed UK-wide presence which, outside of the Naval Bases, is the only Naval presence in many parts of the country.
21. The Maritime Reserve’s strength is 2,809 which represents 86% of the target number which the Royal Navy believes is required – known as the ‘liability’. The RNR is at 94% of liability. The RMR is only at 77% of liability, but it is improving due to increased recruit numbers. In addition to the Maritime Reserve, there are approximately 2,500 Sponsored Reserves, predominantly personnel employed within the Royal Fleet Auxiliary. The Fleet Reserve, consisting of some 16,000 ex-Regular RN/RM personnel with a Reserve liability, is not widely used, but, with better tracking could be utilised for regeneration.
22. Since 2003, the Maritime Reserves have continuously provided personnel as both individual augmentees and as formed detachments to operations in Iraq, Afghanistan, the Northern Arabian Gulf and in support of wider naval operations such as the anti-piracy effort off Somalia. Reflecting the flexibility of the Reserve, many individuals have deployed outside of their specialisations, having been trained specifically for the roles undertaken in theatre. The Maritime Reserve uses the 1 in 3 mobilisation interval (ie a Reservist can be mobilised for one year in every three) enabled by the Reserve Forces Act 1996 (RFA 96). Well over half of the trained strength of the RNR and the majority of the

RMR have been mobilised since Operation Telic 1, with many individuals having deployed several times. In addition, 10% of the Maritime Reserve has been employed at any given point on Full Time Reserve Service contracts, although this has reduced within the last year.

23. The Commission has noted that the RNR Air Branch is unusual in that its aircrew contribution contrasts markedly with the more limited Reservist flying capability in the Army and RAF. The RNR Air Branch is currently providing support to operations in Afghanistan, while simultaneously undertaking Search and Rescue missions and training personnel for the Commando Helicopter Force. A range of supporting roles is also delivered, including specialists embarked in the RN's Response Force Task Group and personnel working in UK Naval Air Stations. The Branch is commanded by a Volunteer Reservist, with minimal supporting staff and a modest budget.
24. The Maritime Reserves cost approximately £32M per year, sub-divided into £19M for the RNR and £13M for the RMR. £12.2M pa (38%) is spent on Reservist pay, with Regular and civilian staff costing £10.1M pa (31%). Estates currently cost £6.2M pa (16%), although work is being carried out to rationalise the overall footprint and reduce this element.
25. The Commission's view is that the RNR is a taut and effective Reserve, well structured, manned and deployed against a clearly defined and current operational requirement. Ex-Regular and civilian skills are used appropriately, within a coherent Reservist organisation, offering a viable Proposition, including command opportunities, witnessed by reasonably buoyant numbers. Amongst a number of recommendations that the Commission makes, the most significant for the Maritime Reserve is a proposal that the National Security Council should examine the scope for them to contribute to new tasks, including UK coastal security and domestic resilience. However we believe that in the longer term the RN should consider greater use of Reservists to man a wider range of roles.
26. We are concerned that the structure of the RMR, with five units, each with its own headquarters, for a total (trained and untrained) liability of some 980 people, is expensive and the permanent staff numbers are too high. It is also short of junior officers, despite having an exceptionally high quality of personnel in its junior ranks (more than 50% graduates in one unit). We believe that the Navy's proposals to make more use of formed RMR troops and detachments will lead to a considerably better officer offer. Both the RN and RM have already started to adopt the Whole Force approach to manning. The Maritime Reserve is well placed within that Force.

## Territorial Army

27. Following the Cold War and the subsequent removal of the requirement for a large reserve against a Soviet attack across the plains of Europe, the TA has reduced from 76,000 in 1990 to 40,000 (post-1998). This is the seventh review it has been subject to since the Cold War. Many of these reviews have ignored their predecessors, often in ways deeply frustrating for the TA. For example, the 1998 Strategic Defence Review (SDR) removed most support weapons from the TA infantry, while Future Army Structures (TA) in 2006 decided that support weapons were to be the major focus of the TA infantry, and reduced the size of sub-units, making it difficult for collective training. The 1998 SDR envisaged

the TA supporting the Regular Army in large scale, mainly conventional, operations. The 2003 SDR New Chapter reflected that the Reserve Forces *“have evolved from a large, but little used force, to one that is structured to support more frequent expeditionary operations”* and envisaged *“the provision of trained individuals and composite sub-units and elements.”* Indeed, the large mobilisations in 2003 and 2004 demonstrated that point. Yet, in 2005, the Army policy stated that it intended in future to conduct a *“Medium Scale operation without recourse to the Reserves”*, using the Reserve to reinforce the Regular Army in large scale operations and for additional capacity when Defence Planning Assumptions were exceeded.

28. In 2005, the requirement to support large scale operations was removed. However, the TA has not been restructured significantly to reflect this, resulting in a force with an unbalanced and unattributed structure which lacks organisational purpose, and with some 80 major units still technically configured for large scale operations.
29. The TA occupies approximately 380 sites spread across the UK. The estate has been subject to limited rationalisation since SDR 1998, meaning some now populous areas have very few TA Centres, whilst others have too many. In particular, unit locations may not maximise potential links into specific civilian skills and industry partnering. Similarly, they are not located to meet any stated requirement for societal connection, support to civil authorities or closer integration with the Regular Army. Efforts to rationalise the estate have been complicated by a lack of clear requirement from the single Services, unwillingness to make decisions at all levels, and a lack of accurate management information about the sites. This has become a source of tension between the Front Line Commands, the Defence Infrastructure Organisation and the Reserve Forces’ and Cadets’ Associations (RFCA) who are charged with administration of much of the Volunteer Estate, and the Ministry of Defence. During implementation of this Review, and the further rationalisation that can be expected, the Ministry of Defence will need to work closely with the new Defence Infrastructure Organisation, Headquarters Land Forces and the RFCA to ensure that changes take account of a wide range of factors, including the importance of TA Centres whose units are well recruited.

## Case Study 2 – Somme Company in Afghanistan:

Somme Company (The London Regiment), was a composite unit of over 140 personnel tasked, initially, to be the Camp Bastion Force Protection Company (FPC) for Op HERRICK 6. The composition was based on a mobilised TA Company Headquarters from The London Regiment, with 4 rifle platoons that integrated troops from other TA units, the Regular Reserve and a platoon from the Regular Army. Somme Company's training for Afghanistan started in April 2006 with field firing, culminating in the 12th Mechanised Brigade Live Firings at Otterburn. On completion of field firing, the Brigade Commander was confident that he could deploy Somme Company as an autonomous Infantry company led by a TA company commander. They deployed to Afghanistan from the 14th March 2007. Close integration with the 12th Mechanised Brigade and its sub-units throughout Pre-Deployment Training, combined with bold command decisions taken in theatre, provided the opportunity for this TA-led Company Group to participate in a range of combat operations. These included Op TUFAAN with 2 MERCIAN in the Upper Gereshk valley, 2 platoons on rotation within the Forward Operating Bases, a platoon carrying out Afghan Police Mentoring, and integrating the Jordanian Special Forces into the 12th Mechanised Brigade, which was important to the UK Government's wider political strategy. The Company also provided troops for the incident response teams (the evacuation of wounded civilians and soldiers from the battlefield and protection of Camp Bastion). The Company completed its tour on the 6 October 2007.

*"Somme Company was an outstanding body of men: well trained, highly motivated and exceptionally well led."* Brigadier (now Major General) J G Lorimer (Commander 12th Mechanised Brigade).

30. TA strength is shrinking, exacerbated by successive in-year savings measures, including an 80% cap on the strength of some units and some marketing restrictions since 2007. Against an establishment of some **37,000**, recent work indicates a TA trained strength of about 20,000, but the active trained strength may be as low as 14,000. Current forecasts see the TA ageing and reducing to potentially unsustainable levels by 2015.
31. The shortfalls in Junior Officer (ie Captain and below) manning are particularly acute, hampered by under-resourced recruiting and lack of clarity over the TA's purpose. Satisfaction has been affected by failures to deliver the Reservist Proposition for officers. In particular, the current emphasis on mobilising junior soldier individual augmentees has reduced both command and deployment opportunities for mainstream (as opposed to specialists) TA officers. However, it is TA soldier strength which has declined the most, declining by 65.5% over the period 1990-2010. For both officers and soldiers, the process of enlistment and medicals is slow, bureaucratic and adds to the scale of pipeline wastage. The network of University Officer Training Corps provide good, effective training for student officer cadets up to commissioning, but the alternative pipeline for commissioning has deteriorated and, in some regions, virtually disintegrated due to the complexity of the administration and lack of critical mass.
32. TA morale was dented by the 2009 freeze on Reservist training and pay. Although reversed, the decision made the TA feel under-valued and vulnerable and created a significant rift between the Regular Army and the TA. It also resurrected the concerns originally expressed by Lord Haldane in 1908 that the Army would be tempted to use its Reserve Force's training budget as an in-year financial regulator. However, with 70% of its budget fixed by Regular manpower, the scale of successive Defence savings rounds has left the Army with few options. Since then, against the context of a TA ill-structured for

the main effort in Afghanistan, the Army faced the hard decision to invest money in those elements of the TA that it could readily use in the current fight, and to reduce activity levels for the rest – this is known as the Graduated Commitment Mechanism. Concurrently, activity levels for all elements of the Regular Army not devoted to Afghanistan have also been reduced or stopped, leaving many TA units with under-resourced and unstimulating training, and all of the administrative burdens. The latter include personnel systems for individual performance appraisal reporting which follow the Regular process, but create a disproportionate load on Reservist officers.

33. Separately, the potential capability of the Army Regular Reserve (35,000 ex-Regular Army personnel with a reserve liability) is not fully exploited. Of the total Reservist contribution to current operations, the Regular Reserve provides just 6%. The wealth of skills and unparalleled operational experience contained within this element of the Reserve must be re-activated cost-effectively when the Nation calls. This is especially salient as the Army will lose 7,000 personnel by 2015 as part of the SDSR reductions. Ex-Regulars are not managed sufficiently well to contribute significantly to operations, not least because the system for transferring is unwieldy and unattractive and often results in the non-commissioned officer having to revert to a lower rank on entry. This is a source of huge frustration to volunteer units who see potential key members lost. This is in contrast with our allies, particularly the US, who use their ex-Regulars to enhance the professionalism of their Reserve cadre. Early betterment must be made to move ex-Regular personnel to a potentially new type of more accessible Reserve status. The current administrative system for managing transfers of ex-Regulars to the TA also needs updating by migrating the processes, onto the Joint Personnel Administration system as soon as possible<sup>7</sup>. In the short term, this would help bolster TA numbers.
34. The TA costs in the order of £490M per year. Of this, £173M goes on the annual cost of activity (pay, ammunition, movement, etc); £180M is spent on paying the Civilian and Regular staff costs for those supporting TA training and administration; £60M to the RFCA; £30M to the University Officer Training Corps and £47M other costs (eg infrastructure running costs).
35. The Commission's assessment is that the TA has not been given clearly defined roles, has been repeatedly reorganised and, since 2006, many units have been in structures that lack the critical mass for imaginative collective training, even where funds are available. Its officer corps has been marginalised by the focus on individual augmentation on operations. It is in serious decline in terms of numbers, capability and morale. Against all the odds, it has risen to the continuing challenge of providing necessary support to operations.

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7. MOD (2011) *Personnel Policy Implementation Team Final Delivery Report*, page 37.

### Case Study 3 – UK Resilience: Cumbrian Floods:

Operation GIRAFFE is the standing contingency plan for providing Military Aid to the Civil Authorities after serious flooding in the UK. This operation was last used in November 2009 in Cumbria, after the highest recorded rainfall caused severe flooding, and destroyed road and rail links. Reserves were deployed in support of life saving activities during the Cumbria floods, then subsequently mobilised in support of a military bridge-building operation. TA Royal Signals specialist teams also provided backup support to emergency Services and the very fragile civil communication system. TA members of 4th Battalion the Duke of Lancaster's Regiment were mobilised to provide a pool of manpower to secure and run the 'crossing area' - where the bridge was constructed. The experience was hugely significant, and constituted the first call out and mobilisation into permanent service of Reserves for UK operations since the 1950s. The Reserves brought local knowledge, awareness and many additional skills to the operation and worked alongside their Regular colleagues to deliver Defence's contribution to a very grateful community.

## RAF Reserve

36. There are 2 reserve air forces; the RAF Reserve comprises individuals with previous Regular service; the Volunteer Reserve component – Royal Auxiliary Air Force – comprises principally reservists without previous regular service. Personnel on Sponsored Reserves commitments serve in a special category of the RAF Reserve. University Air Squadron cadets are excluded from all RAF considerations of 'Reserves' as they routinely have no mobilised liability. The Regular Reserve currently consists of 6,000 personnel, who have incurred a 6 year reserve liability through their non-pensionable Regular service.
37. **Royal Air Force Reserve (RAFR).** The RAFR employs personnel in established Reservist posts - providing continuity of outputs at lower cost compared with regulars on 'contracts' up to 4 years. These personnel are not routinely mobilised, as their abated Terms and Conditions of Service reflect their stability of employment. Additionally, some 290 RAFR personnel fill gapped regular posts funded within the regular headcount.
38. **Royal Auxiliary Air Force (RAuxAF).** The RAuxAF liability is 1,975 posts – allocated against 20 squadrons/flights - principally against Force Protection, Movements, Medical, Intelligence, Media roles and Flight Operations tasks. Of these roles, only Medical, Media and aircrew do not require professional training from the RAuxAF. The RAuxAF is currently manned to approximately 68% of liability (down from 75% pre-SDSR). Its trained strength is just below 1,000 personnel. This reflects the time taken to train civilians, using on average only 35 training days per year. The RAF believes that the bulk of its technically trained trades are not represented in the Reserve Forces because the time necessary to achieve and sustain technical competence is not available. RAuxAF units are mainly located on RAF bases; their outputs are integrated with those of Regulars. There is no discrete RAuxAF command chain and, because mobilisation takes place through the parent RAF station, there is no requirement for a bespoke mobilisation centre.

#### **Case Study 4 – Reserve Aircrew:**

1359 Flight (Reserve Aircrew) currently has a strength of some 25 Part Time Volunteer Reserve personnel, spread across all aircrew trades on Hercules, VC10 and Tri Star. The flight has on average contributed 1,700 days flying per year over last 3 years. More aircrew are being recruited to fly these aircraft types. Their main utility is backfilling training/tasking to allow regular personnel to deploy on operations. However, Reserve Aircrew also deploy regularly although their deployments tend to be of short duration – a maximum of 4 weeks. So far this Financial Year 1359 Flight has completed 8 detachments totalling 105 days in support of the Libyan operation, with further detachments planned. All aircrew on 1359 Flight are High Readiness Reserves. (This is the only significant body of Volunteer Reserve aircrew in the RAuxAF – there are a further 90 aircrew on Full Time Reserve Service).

39. It is our view that, whilst the RAF has partially adopted the Whole Force Concept principles, it now needs to be more vigorous in their application, providing far more opportunities to maximise its use of the Nation’s talent, especially that from the aviation industry. Proportionally, the small number of Reservist personnel in the RAuxAF is far outstripped by the equivalent numbers in allied forces.

## **Special Forces**

40. The SDSR announced that the Government would significantly enhance Special Forces and increase their capability. Accordingly, both of the Special Forces Reserve units will be retained and steps will be taken to further enhance the output of the Special Forces Reserve overall. Modest changes will be made to the organisational structure. As Reserve personnel can fulfil a number of roles, the Commission sees this as a valuable opportunity to further develop military capability, while integrating Reserves into the Regular structure.

## **Defence Medical Services (DMS)**

41. In terms of Reserves integration and adoption of the Whole Force Concept the Commission sees the Medical Reserves as an exemplary specialist model. They have been routinely deploying as formed Units and individual augmentees since the start of operations in Iraq and since 2003 Reserves have provided over 40% of the hospital-based personnel for operations in Afghanistan, as the ‘lead unit’ for 50% of the operational tours.

### Case Study 5 – Current Medical Support to Operations:

The Medical Reserves are fully integrated within Defence Medical Services (DMS) and are a key element of the support to ongoing operations. Within the UK military, the DMS are recognised as a leading practitioner of a Whole Force Concept, with the Royal Navy, Army and RAF Medical Services routinely deploying Reserves as individual augmentees to Regular Medical Units and also as formed units of the TA. Since the start of Operation Telic, Reserves have provided a large proportion of the UK's medical support to operations and have filled over 40% of the hospital-based liability on Operation Herrick. In addition to the hospital-based surgical capability, RAF Auxiliary units also provide individual personnel to support Aeromedical Evacuations. RAF paramedics have been on continuous deployment with the Camp Bastion based Medical Emergency Response Teams since May 2009. Individual RAF Reserve paramedics have played an integral role in the clinical teams who so far this year have flown more than 400 missions to retrieve casualties on Op Herrick. These missions have been in support of both the 212 (Volunteer) Field Hospital deployment and the more recent Royal Navy led medical deployment, which is in turn reinforced by more than 10% of the trained strength of the Maritime Reserve Medical Branch. This integrated approach demonstrates the adoption of Whole Force Concept and jointery in its widest form.

42. Overall DMS manning numbers (at Oct 2010) are approximately 10,400, of whom 8,200 are Regular personnel and 2,200 are Reserves (2000 Army, 130 RAuxAF, 70 RNR, against establishments of 3400 Army, 230 RAuxAF, 150 RNR). Whilst there are 14 Land Field Hospital Units, of which 11 are Reserve Units, there also 2 RAuxAF Squadrons, and RN Reserves attached to various establishments. The TA also support a range of Land based Units such as 16 Close Support Medical Regiment. The RAuxAF and RNR predominantly deploy individual augmentees, who are used to support strategic aeromedical evacuation in the case of the RAF, and in the case of the RNR are used to backfill firm base commitments. Whilst recognising the significant contribution that Medical Reserves have made to operations the Commission notes that, in common with DMS Regular cadres, there are a number of shortages. These include consultants in anaesthetics and resuscitation, emergency medicine, trauma and orthopaedics and burns and plastics, as well as nursing shortages in burns and plastics, orthopaedics, emergency medicine and Intensive Treatment Units. Recruitment and retention of qualified medical personnel is a challenge and the long training pathways for clinicians have led to difficulties in attracting personnel once they are qualified. These factors mean that it has been difficult to increase Medical Reserve numbers.
43. The NHS, as the employer of the majority of Reserves and potential Reserves<sup>8</sup>, and the provider/commissioner of much of the medical training in the UK, is a key stakeholder in developing the role of Medical Reserves. At the same time as the Ministry of Defence is considering FR20, the NHS is undergoing radical reform. The result of this uncertainty is already being felt by increasing, and in some case, severe, difficulty in being able to secure appropriate clinical placements for DMS Regular personnel. The Commission believes that managing the relationships between the Department of Health, the NHS and the Ministry of Defence will require continuing attention at both the high level Partnership Board, and at management level within Trusts. In the last three years, DMS has made considerable progress in its advocacy of Reserve service amongst NHS employees in Scotland. The flourishing relationship between DMS, the Scottish NHS Regional Health Boards and 205 (Scottish) Field Hospital now represents an exemplar model of the

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8. Around 75% of employment within the UK's health sector is within the NHS.



partnership approach to personnel management. The two Scottish RFCAs through their links with the Scottish Executive played an important role in brokering this.

44. In order to develop the DMS Reserves to allow the realisation of the Commission's proposals, it is necessary to reverse the perceived erosion in status of the Reserves, building on the successes achieved in Scotland, where the partnership between the DMS, the RFCA and employers has been very effective in improving the Proposition.
45. In addition to the benefits to Defence, the DMS is uniquely placed to share the development of operationally specific medical science and clinical excellence with the NHS. The National Institute for Health Research (NIHR) has brought both military and civilian trauma surgeons and scientists together to share innovation in medical research and advanced clinical practice in the battlefield to benefit all trauma patients in the NHS at an early stage of injury. This is a clear demonstration of what is good for Defence also being good for the UK population at large. The proposed options for increased use of Reserves will further benefit the already well integrated Ministry of Defence/Department of Health relationship.

## International Comparison

46. As the Prime Minister requested, the Commission has looked in detail at several international models in order to put the state of UK Reserve Forces into context. While it is dangerous to make direct comparisons, since every nation's Reserves reflect their bespoke circumstances of culture and geography, some broad conclusions have been drawn. The state of our Reserve Forces is thrown into stark relief when contrasted to those of the US, Canada and Australia (the other ABCA<sup>9</sup> countries). The most obvious contrasts with these countries are that:
  - Each has a higher proportion of Reservists in the overall Force Structure (eg 40-50% of each Army) as opposed to the TA, which is currently only 20% of our total Army;
  - In most cases their Reservists enjoy far higher levels of collective training;
  - Their Officers receive much more intensive training (especially post-commissioning);
  - Their armies are structured into Reservist brigades, commanded by Reservists;
  - They are principally deployed on operations as formed units or sub-units, as well as providing augmentees;
  - Collectively they fulfil a much wider array of roles, including flying modern fast jets in some cases; and,
  - Individual Reservists have far greater command opportunities, including almost all Reservist units and brigades.

Closer integration of Reservists within a wider range of challenging tasks develops a culture of mutual respect between the Regular and Reserve components. It is also evident that the Reserve Forces of our comparator countries have an important role in domestic

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9. American, British, Canadian, Australian and New Zealand.

resilience – indeed this is seen as pivotal in maintaining both Employer and wider public support for Reserve service.

47. However, none of the nations studied has been able to justify the use of Reservists on the basis of cost-effectiveness alone. The US government uses a wider 'value' proposition for its high proportion of Reserves, based on the provision of strategic depth and widely dispersed community engagement which it assesses strengthen the case for a robust defence budget.
48. The USA has used large numbers of Reservists from all its services at unit level since Operation Desert Storm (1991), including manning fast jets, armour and artillery, and providing infantry. From 2003 onwards, it has regularly used formed brigades of the National Guard, and at one point Reserves constituted more than half of the US forces in the Gulf. Canada included a formed militia infantry company with every battalion sent to Afghanistan whilst Australia has deployed three formed sub-units. All three countries make regular use of formed bodies for lower intensity operations and hold their Reserves at higher readiness for domestic operations, such as disaster relief and managing the consequences of terrorism. The other ABCA nations structure some of their Reserves inter alia to project territorial sovereignty over significantly larger geographical areas, in a manner that cannot be easily, or affordably, performed using Regular manpower alone. This is a significant role in Canada and Australia, but not a factor in the UK.
49. It is evident from the Commission's analysis that a greater perceived existential threat to a nation raises support for the use of Reserves, and improves a society's underlying tolerance for spending on such contingency forces. The attacks on the World Trade Center in 2001 renewed the Cold War perception of an existential threat to the US, and found resonance within its distinct 'militia nation culture'. For Americans, and despite a \$14 trillion national debt, this perception justifies greater than double the UK per capita spending on Defence, and is a significant factor in the manner in which the US employs its Reserves. Nevertheless there was widespread support for Guard and Reserve deployments in the First Gulf War, long before 9/11.
50. In comparison with our allies, UK Defence is not postured to optimise the recruitment and retention of talent and skills. By providing much greater Reserve officer training 'up front' and structuring it around the academic year, the UK could greatly improve standards at low cost. Considering new and radical methods of appropriating specific technological skills into the Reserve Component, as the Israeli Talpiot Programme<sup>10</sup> has done, would present a more dynamic and retention-positive Proposition to future leaders. By restructuring their large Reserve Forces into a more integral 'Total Force' concept, and integrating personnel systems, the US, Canada and Australia are also enabling the efficient migration of Active Component personnel into the Reserves, which is in turn significantly improving the performance and professionalism of the Reserves on operations. The UK should undoubtedly do better in this area.
51. The over-arching conclusion from the international comparison analysis is that our allies recognise the value that Reservists bring in maintaining society's understanding of the reasons for continuing to invest in Defence. By better officer training and more intelligent use of ex-Regulars in the Reserves, they have also achieved a higher degree of professionalism in their Reserves, for example the US Air Guard is responsible for the defence of most the airspace of the USA as well as flying combat air patrols in F-16

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10. Started in 1979, the Talpiot programme selects promising science /technology students for an enhanced education for a return of military service. The scheme is broadly credited for contributing to Israel's technological boom over the past 20 years. (See Annex D, para 8).

squadrons over Pennsylvania and Afghanistan. Provision of better, more condensed training, particularly collective training, has allowed them to maintain an attractive proposition and the respect of their Regular counterparts. The provision of a hierarchy of Reservist brigade commanders has sheltered the Reserve Forces from the cycle of reorganisation and the associated disproportionate cuts which have hit our Reserves. We can learn from their experience and practice. More detail on the International Dimension is provided at **Annex D**.

## Summary

52. The Reserve Forces are in decline and they form too small a part of our overall military capability. The Proposition is not being delivered in many areas, and the opportunities for training, command and deployment as formed bodies are fewer. The main problems, in terms of both scale and depth, are in the TA, where the offer is ceasing to be attractive and its roles are structured for past requirements. Furthermore, Defence could better exploit the wider civilian talents available across the UK, use the Reserves better to reinforce the links with society, and enhance the cost-effectiveness of its human capability by altering Defence's manpower mix. There are many areas where our Reserves are not being used in the most cost-effective manner. The Volunteer Estate requires sensitive rationalisation, the TA force generation factors must be improved and, once the officer and non commissioned officer base has been rebuilt, training overheads must be reduced, and more effort must be made to integrate the Reserve component within the Whole Force. A new governance system, designed to ensure independent scrutiny of the way the Reserve Forces are managed inside Defence and to safeguard the critically important Reservist Proposition, which distinguishes Volunteer Reserve service from Regular service, is required. If this can all be achieved, as we sincerely believe it can, then Defence has the potential to produce refocused Reserves and a significant enhancement to Defence capability in the round.



## Section 2

# Taking the Reserves Forward: An Outline Plan for the Future

53. The Commission shares a common vision for the Reserves in 2020:

*A Reserve Force that is an integral element of the Whole Force; that is optimised to deliver assured capability across all military tasks on operations at home and abroad; that harnesses for Defence the widest pool of talent in the UK; and that upholds the volunteer ethos. A force for good in the community, that effectively represents both Defence and Society; and that is sustained by formal governance safeguards and an appropriately resourced and equitable Reserve Proposition.*

Given the future threats identified in the National Security Strategy, the Commission is convinced that only a response configured around the capabilities of the *Whole Force* can provide the agility to deliver sustainable and affordable security.

### **Recommendation – Whole Force Concept (WFC):**

The Ministry of Defence must now direct and implement the adoption of the WFC. Implementation will require optimisation of the Regular, Reservist, civil servant and contractor mix, balanced against operational risk and affordability.

54. Based on the analysis of Section 1, we recognise that the scale and pace of change required is significant. We are also mindful of the critical priority to sustain operations in Afghanistan and elsewhere, and for the Ministry of Defence to implement an already significant portfolio of change and efficiency in the aftermath of the SDSR. We therefore advocate a three stage approach to reform:
- a. **Stage 1: Investment and Betterment.** To arrest the decline of our Reserve Forces the Commission recommends that an immediate period of investment and betterment is required. This would put our Reserves on a healthier footing in respect of recruiting, manning and the Reserve Proposition and be coupled with an immediate commitment to a larger Reserve and a set of clearly defined roles.

- b. **Stage 2: Enabling the Future.** At the same time, we believe there is a requirement to put in place a range of enabling measures, some based on changed legislation, to help guarantee the availability of Reservists. This will potentially alter the nature of the relationship between Government, Society, the Reserves and their Employers. This is a necessary precondition for the third stage.
  - c. **Stage 3: Realising the Potential.** The third stage, following withdrawal from Afghanistan, would be a calibrated change in the Regular:Reserve force balance, but within a more integrated force structure. This stage would enable the full realisation of revised Reservist roles and the cost-effectiveness which derives from a Whole Force approach.
55. We envisage the first two stages will take until 2015 and that the next SDSR should confirm the degree of ambition to be realised in the third stage. The following paragraphs provide some detail on our vision.

## Stage 1: Investment and Betterment

56. The first stage of our recommendations is fundamental to turning the tide of Reservist fortunes. At least four basic elements need to be addressed to achieve this: redefine Reservist roles; improve the Reservist Proposition; increase manning levels; and implement a number of immediate initiatives to restore Reservists' sense of value.
57. **Redefining Reservist Roles.** We have seen that the roles of some Reservists, mainly within the TA, have not been redefined since the Cold War and yet a modern and relevant role is absolutely fundamental to a Reservist's sense of purpose. These roles must be tied firmly to the Defence requirement which in turn flows from the National Security Strategy. Therefore, the Commission recommends that, as part of an integrated force, all Reservists are formally attributed to at least one role within Defence Planning Assumptions. The National Security Council should review what additional roles the Reserve Force should undertake in the future. The specific roles we recommend are:
- a. **Specialist Tasks.** Employing Reservists as specialists is a cost-effective way of importing civilian expertise rather than replicating expensive training pipelines. We have identified a range of specialist skills in areas such as Cyber, Medical, Intelligence, Police, Linguistic and Stabilisation, to which the Reserves of all three Services should contribute. A growth in the capabilities within the Defence Cyber Operations Group (DCOG) and the Military Stabilisation Support Group (MSSG) are among our recommendations. In more detail:
    - (1) **Cyber.** To defend against the growth in the Cyber threat, Defence will need to engage additional civilian experts. This may involve outreach to skills in IT firms and the establishment of a larger Reserve structure around the DCOG. The TA already has an excellent Cyber unit, recruited from some of the best specialists from the worlds of international finance, security and policing. It has carried out a range of challenging operations both in support of our forces in Afghanistan and Iraq and in a much wider context.
    - (2) **Conflict Prevention and Capacity Building.** The SDSR highlighted the ongoing commitment to tackle at source the causes of instability and invest in a more stable world. The expectation is that the UK will continue to expand its ability to build capacity in other states. The Commission is aware that the SDSR intent is now

being translated into the 'Building Stability Overseas Strategy' and we believe that the Ministry of Defence should continue its engagement to identify how and where Reserve expertise can best contribute. But we also recommend new specialist capabilities are considered, such as an expeditionary field hospital for deployment on Humanitarian Relief in the context of international civil disaster.

#### **Recommendation – Civilian Skills Database:**

Continue to develop a data capture process to enable recording of Reservists' civilian skills.

(3) **Sustaining Technological Advantage.** More widely, as part of the Whole Force Concept, the Commission believes that Defence should be actively seeking civilians from leading technology companies to maintain our technological advantage over potential adversaries. We recommend the pursuit of partnerships with universities and industry, as well as development of schemes similar to Israel's successful Talpiot programme.

#### **Recommendation – Enhancing Defence Technological Advantage**

Work with key partners to establish accredited development schemes to enhance Defence technological advantage, similar to Israel's Talpiot programme.

- b. **Contingent and Deployed Operations.** The Reserves must become a more integrated part of the routinely deployable Whole Force. Their roles must be clearly defined and ideally they should be part of a predictable and/or recurring deployment cycle, where readiness changes can be anticipated well in advance. A proportion of these may be individual augmentees, as it will normally be easier for individual Reservists, rather than Reserve units, to respond to shorter-notice demands. Where collective Reservist groups are needed as formed sub-units (or units if the situation is sufficiently permissive), the training and maintenance burden should be minimised, and we should examine best practice abroad in order to develop an efficient mechanism to deliver appropriate training, deployment and recovery within a 12 month mobilised period. The exception might be in areas where the skill set is almost directly transferable from the Reservists' civilian life and/or embodied in ex-Regulars, or, where a Sponsored Reserve contract can be arranged with industry, Reserve units could undertake highly complex tasks and for shorter periods – the field hospitals are an example. Alternatively, tasks for Reserve units should be selected where the threat, and therefore the training level required, is less demanding, eg UN operations in Cyprus and the UK's security commitment to the Falkland Islands.

#### **Recommendation – Formed Sub-Units:**

Commit to returning formed sub-units to 'the fight', and continue to use units in more permissive environments entailing a return to collective training at unit and sub-unit level: TA and RMR, plus some opportunities in RNR and RAuxAF.

- c. **UK Resilience and Homeland Security.** In the UK, responsibility for civil contingency rests with the Cabinet Office and local and regional authorities. However, international comparative analysis, and recent global occurrences of natural and man-made disasters have highlighted the need for a comprehensive and sustained response to such events. Whilst first responders to these emergencies are not currently military, the Armed Forces have provided assistance when requested. Following their successful use

in the response to the Cumbrian floods, there is now a stronger case for a properly constituted capability based on Reserve manpower. Therefore we recommend that the majority of Reserve Forces, with their wider footprint and local knowledge, have a role in helping sustain Government responses to domestic emergencies. We also recommend that consideration is given to more formalised roles for elements of the Reserves in Homeland Security. Specifically we envisage roles in Maritime Coastal Security and Chemical Biological Radiological and Nuclear Protection. In making this recommendation we recognise the need for Government to resolve the issue of funding, not for the contingent capability, but for its actual use. However, in order to initiate this reinforcement capacity, we recommend that the Ministry of Defence core budget contains funds to cover the cost of 5,000 Reservists being used for 5 days per annum.

#### **Recommendation – UK Resilience Funding:**

That the Ministry of Defence core budget contains funds to cover the cost of 5,000 Reservists being used for 5 days per annum.

- d. **Regeneration.** Ultimately we see a role for the Reserves as the formal basis for national regeneration of larger Armed Forces if future threats demand it. The Ministry of Defence will need to determine what framework is required for this task and what efficiencies can be derived from placing more capability into the Reserve at extended readiness. The Commission recommends that the Ministry of Defence should formalise plans and have the necessary ‘seed corn’ in place to enable the Reserve Force to be scaled according to the developing threat. In addition, a sensible risk assessment is required to consider placing some capabilities at lower readiness in the Reserves. For instance, the Commission sees no strong reason why Reservist Fast Jet, Support Helicopter Squadrons and warships should not be considered in the future, making greater use of ex-Regulars’ skills.
- e. **Connecting with the Nation.** The benefits of using Reservists to help connect with the Nation are extensive. We believe that there is a strong case for maintaining a dispersed volunteer estate in order to help the Armed Forces maintain their connection at a time when the Regular force will increasingly operate from fewer bases.

#### **Recommendation – Attribution and Connecting with the Nation:**

All Reserve force elements must be attributed to specific roles which should include: specialist tasks, contribution to deployed and contingent operations, UK Resilience and Homeland Security, regeneration, Connecting with the Nation.

Allocate the Reserves a more formalised role in connecting Defence with society and the Nation at large.

- 58. **Improving the Reservist Proposition.** Attracting and retaining high calibre people is at the heart of achieving a good quality Reserve. Such people have to feel inspired by their chosen Service to be willing to have a twin-tracked career. The Commission has concluded that the current definition of the Reservist Proposition “*Defence will offer the challenge and reward which attracts people to volunteer, and undertakes to train and support them throughout their Service, including when mobilised and recuperating*”<sup>11</sup> does not encapsulate fully the offer which those who are to be officers and non commissioned officers in the Reserves need. A reworked Proposition must recognise the commitment,

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11. MOD (2009) Strategic Review of Reserves 2009, pages 1-2 and 1-3.

motivations and special qualities of the volunteer; *“it must offer opportunity, including command and leadership, which satisfy the volunteer ethos”*. And the Commission believes that improvements like better training opportunities, especially in collective training and in officer development must be resourced to prevent further long-term damage to the Reserve. A fuller list of the recommendations, is at **Annex A**. We note that, post-Afghanistan, the challenge may be in providing an outlet for the ambitions of those Reservists who join specifically to deploy on operations.

#### **Recommendation – Revised Proposition:**

We recommend a reformulation of the Proposition to embrace opportunities for leadership and command, as follows:

*“Defence will offer the challenge and reward which attracts people to volunteer, and undertakes to train and support them throughout their Service, including when mobilised and recuperating; it must offer greater opportunity for command and leadership, in order to fully satisfy the volunteer ethos.”*

59. With both the TA and RAuxAF suffering serious shortfalls in Reservist numbers, the Commission recommends that consideration is given to the re-establishment of the various Reserve decorations. The visibility that such decorations give to the particular commitment of the Reservist is significant.

#### **Recommendation – Volunteer Reserve Decorations:**

Consideration is given to the reinstatement of Volunteer Reserve decorations (ie Reserve Decoration (RNR/RMR), Territorial Decoration and Air Efficiency medal) for long service and efficiency, recognising the different sacrifices made by Reservists.

60. The Commission recognises that the move to the Whole Force Concept may change the nature of the Proposition as it is currently understood, although we feel that Reservists are likely to welcome this greater clarity. For example, a greater reliance on the Reserves within the Whole Force may require greater compulsion for some training, in order to ensure that units remain at the correct readiness level. It is also likely that the elements that make up the Proposition may alter over time as Defence’s requirements change. Contributory factors might include the changing threat, Defence responses, Whole Force structures, the budget and legislation. Defence should not fear such change, but recognise that a significant shift in the nature of military volunteering will require adjustments to the expectations of serving Reservists and changes in the marketing to new Reservists.
61. With the move towards the Whole Force, the Commission suggests that the Reserves should be fully represented within the Armed Forces Covenant. Finally, to avoid any repeat of today’s perilous situation, we believe that the health of the Proposition needs to be monitored and protected within a robust governance system. We return to this in paragraph 102 of Section 3.
62. The requirement to re-invest in the Reserves’ Proposition also offers the opportunity to trial new and more innovative methods of drawing high-grade young officer candidates into the Reserve Forces. One such initiative, proposed by National Employers’ Advisory Board, recommends the piloting of a ‘Partnership for Talent’ between Defence, Education and Industry whereby the three are in a joint venture in seeking talented school-leavers and undergraduates. The aim would be for Ministry of Defence, Higher Education



establishments and civilian companies to jointly recruit, train and develop selected high calibre graduates; potentially involving the mutually beneficial co-sponsorship of successful candidates through college or university. Subsequent Reserve service could be used by Employers as an integral part of their management training – rather than a distraction from it. Proposals currently suggest a linked career profile of approximately three to four years, prior to decoupling of the respective career paths resulting in a future capable civilian employee and a motivated Reservist. Southampton University has expressed interest in leading a pilot project.

#### **Recommendation – Partnership, Recruiting and Training:**

That the Ministry of Defence engages with large Employers of Reservists and Defence Industry under the Defence Career Partnering initiative to establish pilot programmes to deliver ‘Partnership for Talent’ as soon as possible. This will form a key part of the recruiting drive for Reservists required as part of Stage 1 of FR20 implementation.

63. **Increased Manning Levels.** The Commission’s assessment is that the manning levels of the Reserves must be increased. In the case of the RNR/RMR and RAuxAF, where the existing operational requirement is apparent, actual personnel numbers are well below those needed. Despite its current Cold War structure, we believe that the TA is below critical mass for the range of tasks that it could reasonably be asked to undertake in the future. We also believe that the size of the Special Boat Service Reserves and the supporting capabilities of the Special Forces should be increased. Moreover, the conditions need to be set now for the realisation of a Whole Force by 2020, replicating the best practice of our closest allies.
64. The Commission has considered a number of options for changing the liability (authorised size) and hence desired strength of the Reserves. For the RN and RAF Reserves, these numbers are less contentious. Broadly, action needs to be taken to increase their strength to match their existing commitments, and then a further step to take account of the additional tasks which the Commission recommends should be assigned to them. In the case of the TA, this is more challenging given its size and the outmoded roles to which it is currently attributed. Taking each in turn:
  - a. **RNR/RMR.** Their current requirement for **2,400** trained personnel is justified by existing tasks; initially therefore the Maritime Reserve needs to increase from its current trained strength of **1,900** to meet this requirement. Thereafter, the Commission’s proposed additional roles for the RNR/RMR will increase the requirement to a total of **3,100** personnel.
  - b. **TA.** The current overall requirement for the size of the TA (trained and untrained, Group A, ie excluding University Officer Training Corps) of some **37,000** is based largely on obsolete planning assumptions. Whilst it is difficult to divide the number into trained and untrained figures, a requirement for **30,000** trained reservists within that total is a reasonable approximation, against which the TA’s current trained strength has been allowed to drop to about **20,000**. The Commission’s view is that the combination of roles outlined above provide a strong justification for increasing the current trained strength back to **30,000**, assuming that an additional **8,000** would be under training at any given time to sustain this number. Notwithstanding the initiatives recommended in this Report, we acknowledge that it will be challenging to increase the TA’s trained strength by 10,000 by 2015. We recognise that the detailed Order of Battle (ORBAT) for the TA cannot be finalised until the Army’s Multi-Role Brigade structures have been finalised and future Reservist roles endorsed. However,

given that the trained strength liability of the TA will be broadly unchanged under our proposals, we assess that the number of local TA units will remain similar, albeit with some re-rolling and some re-balancing of units, in order to build up sub-unit size in certain units to achieve critical training mass.

**Recommendation – Critical Mass:**

Increase Reservist sub unit size to produce greater critical mass for training, disbanding some poorly manned nationally recruited TA units to release liability.

- c. **RAuxAF.** The RAuxAF’s current trained liability of about **2,000** is probably larger than can be justified post-SDSR. The Commission agrees that a trained liability of some **1,800** would broadly meet its current requirements. Therefore, initially the RAuxAF needs to increase its current trained strength of some **1,180** personnel to meet this liability. Our recommendations will result in some variation of the existing tasks within this 1,800 ceiling. If a robust analysis of the prospects for putting elements of the RAF at lower readiness were to be carried out, as we believe it should, there is scope for a considerable increase in Reserve numbers, and a reduction of Regular manpower.

- 65. In summary, the Commission’s recommendation is that the betterment package should result in a rejuvenated and more stable Reserve Force Structure of trained manpower by 2015 as follows:

	<b>Current Strength*</b> (2011)	<b>Commission’s Recommendation**</b> (2015)
Royal Navy (RNR/RMR)	1,900	3,100
Army (TA)	20,000	30,000
Royal Air Force (RAuxAF)	1,180	1,800

\*The figures reflect Reserves trained to Phase 1 level.

\*\*These figures reflect Reserves fit for role (trained to Phase 1, Phase 2 and where applicable, to Phase 3 levels).

**Recommendation – Increased Manning Levels:**

The size of the Reserves must be increased so that their strength matches Defence’s requirement, making them viable entities, better able to sustain Defence outputs. By 2015, Reservist trained strength should be: RNR/RMR 3,100; TA 30,000; RAuxAF 1,800.

A recruiting and training surge will be needed to meet the demands of the revised Reservist roles and to provide for more viable unit strengths. The establishment of an effective recruiting and training mechanism to handle the potential surge requirement will be an essential pre-condition of success if Reserve manpower decline is to be arrested initially and then increased. This should include rapid changes to existing processes and Regulations to make it more attractive for ex-Regulars to join the Reserves on leaving.

## Stage 2: Enabling the Future

66. The second stage of our recommendations is designed to put in place a range of enabling measures, some based on changed legislation, which will alter the nature of the relationship between Government, Society, the Reserves and their employers. This will create the circumstances from which a significantly larger Reserve should be grown in Stage 3. Key elements of this are: legislation; employer support; marketing, recruiting and training; volunteer estate; career planning; and some wider policy issues.
67. **Legislation.** Our analysis shows that new legislation will be required to improve the mobilisation process, allow for more flexible use of the Reserve (particularly in regards to operations in the UK) and ensure that robust employment protection and support safeguards are in place. Having legislation in place enables the Reserves to be utilised effectively, providing these changes are clearly understood, have full political support and mobilisation notices are sent in a timely fashion. Key issues include:
- a. The Reserve Forces Act 1996 and the Reserve Forces (Safeguard of Employment) Act 1985, as the two key pieces of primary legislation related to the Reserve Forces, are broadly fit for this current purpose. However, the strict limitation of circumstances under which mobilisation can be undertaken is now out of step with the ambition and requirement of the Whole Force Concept.
  - b. Therefore, the Commission fully supports the proposed amendment to the Armed Forces Bill to enable mobilisation of Reservists for UK Operations involving ‘urgent work of National importance’ which is, at the time of writing, under consideration by Parliament. This amendment will enable the use of Reservists in supporting a wider range of UK operations than currently permitted. Specifically it will make the Reserves available to assist in relation to incidents such as extreme weather, providing support following accident or security incidents (including medical assistance) and to support high profile national events. Evidence from abroad suggests that such engagement, even on a very limited basis, provides a disproportionate benefit to societal and employer support.
  - c. The implementation of the Whole Force Concept and the New Employment Model offers the opportunity to examine a further extension in legislation, either through a revised RFA for 2013, or a single Armed Forces Act in 2015-16, although legislation could be introduced earlier with sufficient political drive. Legislative changes may be needed to facilitate the possibility of:
    - Enabling more flexible mobilisations in a greater range of circumstances, from multiple short-term usage to support UK civil contingencies, to ensuring long-term availability in key operational roles.
    - Greater compulsion and improved support mechanisms to undertake training, to reduce the readiness risk inherent in a Whole Force approach.
    - Use of a Reservists’ civilian skills, including developing and enshrining the potential of educational/industrial/Defence partnerships.
    - Introducing anti-discrimination legislation for Reservists, along the lines of some other countries.
  - d. Whilst the Commission’s view is that we should not routinely mobilise our Reserves for peace, it recognises that enhancing the Reserves’ utility will also require a degree of political will to use legislation currently in place to ensure the viability of some elements of training. We believe that no Reservist should be routinely compulsorily

mobilised for longer than 12 months – this is the maximum that the Reservist and Employer would be likely to bear for routine ‘discretionary’ tasks. Legislation exists to extend mobilisation for a greater period should an existential threat or an unforeseen dire emergency materialise.

- e. The Commission believes that there should, in time, be a broader inquiry into the state and suitability of Employment legislation, with a view to allowing greater training commitment and to providing enhanced support to Reservist and Employer, specifically in advance of and in support of mobilisation.

68. **Employer Support.** Initiatives will also need to be put in place to ensure that employer support for Reservists is encouraged, recognised and potentially rewarded. Current Employer Support activities have reduced mobilisation risk effectively, but much more could be done. Relatively simple methods of recognising national employers for their contribution to Reserve Forces, such as a ‘Kitemark’, have proved successful for other nations (and could be amongst the criteria considered when selecting those bidding for Government contracts). This should also be extended to Government Departments and local authorities who employ Reservists. Organisations should be encouraged to consider military volunteering as an important element of their social action plans. There may also be opportunities to explore partnerships between Defence/Industry/ Education/Reservist to provide joint funding for individuals to obtain mutually beneficial qualifications, practical experience, training opportunities and accreditation. The Commission’s desired end state for employer support is to draw society, through employers, into the Whole Force by introducing more collective responsibility for national security.

#### **Recommendations – Employer Recognition, Employer Feedback and Legislative Change:**

Formal recognition of Reservists’ employers (such as a ‘Kitemark’) is required, to include Government Departments and local authorities who employ Reservists. Employers should be encouraged to consider military volunteering as an important element of their social action plans.

Give employers greater feedback on what their Reservist employees have completed during training, describing any competencies and skills gained.

Legislative changes are required to enable better use of Reservists in support of Defence outputs at home and abroad, whilst protecting Reservists’ and Employers’ interests.

69. **Marketing, Recruiting and Training.** The Commission is convinced that Reserve marketing and recruiting must be focussed on delivering immediate change to the size of the Reserves. This activity must fully exploit technology such as social media. The enlistment process must be updated and streamlined to reduce the number of potential Reservists who walk away at an early stage frustrated by long delays in processing. This will need to recognise the bespoke circumstances of Reserve service, focused at the regional and local level, and should potentially re-invigorate the responsibilities of the RFCAs in support of local commanders. We do not believe that current proposals for a wholly national marketing and recruiting system are appropriate for Reserves.
70. The officer training pipeline outside University Officer Training Corps (UOTCs) is cumbersome at best. A new approach, arising out of the Roskelly UOTC Study 2010 will be piloted by the Army in September 2011 in two regions. This will bring together Officer Cadets from outside university with those in UOTCs from the second year onwards. This is a very welcome initiative, but will not be available for over a year in most of the country

(if the pilot is successful) so in the interim we recommend that all Officer Cadets be allowed to join UOTCs as these offer good quality training.

#### **Recommendations – Recruiting, Marketing and Training:**

Restore funding for recruiting and marketing to enable betterment measures to be implemented.

In the short term, reinvigorate the Reservist recruiting and training pipeline to halt the decline and rebuild numbers.

For the longer term, determine the strategy to enable the Recruiting Partnering Project to fully support Reservist recruiting.

Make rapid changes to existing administrative processes and regulations to make it more attractive for ex-Regulars to join the TA.

71. We believe that one of the greatest deficiencies in UK Reserve officer training, compared with allied nations, is in 'special to arm/branch' training (Phase 2 and 3 training). This is the training after commissioning which teaches officers the specialist skills required by their branch, arm or service. We suggest that much longer periods of Reservist special to arm training be offered, optimised to fit in with university vacation/post-graduation breaks and summer holidays for those officers and soldiers not in further/higher education. One solution would be to reschedule a Regular course in each branch or arm, to start in June, so that Reservists could do it before commencing their civilian careers.
72. We also believe that there is greater scope for tailoring training to fit the Reservist employment style, with delivery of e-training where possible, in a modularised fashion, making maximum use of the internet and, where applicable, delivery of more training through simulation and synthetic environments.

#### **Recommendations – Rebuild Officer and Soldier Training and E-Training:**

Allow all Officer Cadets who are not students to join University Officer Training Corps (UOTC), as a temporary measure, until the full UOTC Study recommendations have been implemented.

Introduce special to arm training for Reservists aligned to university summer vacations/post graduation breaks, and summer holidays for those officers and soldiers not in further/higher education.

Deliver improved individual training and education via the internet, simulation and synthetic environments.

73. **Volunteer Estate and Infrastructure.** There is enduring validity to the recommendation of the Strategic Review of Reserves 2009: *"The Volunteer Estate (VE) should be modernised and strategically rationalised to improve its strategic management and design its 21st century footprint"*. The implementation of FR20 provides the first opportunity for a number of years to address all of these issues and ensure Defence delivers a fit-for-purpose Volunteer Estate <sup>12</sup> of the required size and in the correct locations. A significant number of Reserves are accommodated on the Regular Ministry of Defence estate

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12. This includes standalone VR sites and where VR units sit on the Regular estate.

(approximately 5,000 TA personnel and virtually the whole of the RAuxAF). That said, it is likely that pressures on the Regular Estate (eg re-basing from Germany) will prevent significant Reservist expansion in this area. The lack of tri-Service strategic focus in setting out a customer requirement, coupled with successive reviews, has hampered improvements in estate utilisation<sup>13</sup> and this has allowed inefficiencies to persist. Evident spare capacity should now be subjected to a targeted and strategically-managed rationalisation programme, whilst remaining mindful that any future changes to the Regular:Reserve balance might require additional capacity in which to base potential Reservist expansion. This is essential to ensure that a fit-for-purpose, properly resourced Volunteer Estate is maintained.

74. The rebasing of all forces from Germany back to the UK by 2020 will be centred on a formation-based footprint for multi-role brigades which will be in tension with Defence's requirement to recruit and support the Reserve element of the Whole Force. Such a footprint may also be inadequate to meet UK Resilience expectations and the requirement to connect with the Nation. Therefore, analysis will be required and direction given to determine the optimum Whole Force laydown against these factors. A range of issues, including the particular characteristics of Reservists' home to duty journeys, must be considered in order that re-basing does not inadvertently compromise the ability to recruit and retain Reserve personnel.
75. We propose that there must be a balance between the optimal volunteer estate requirement for operational imperatives and the need to retain close connection with the Nation in some parts of the UK. We recognise that the Cadet Forces offer an additional, more dispersed footprint, but we believe that as much of the population as possible should be able to volunteer for the Reserve.
76. As part of an integrated force, the future basing strategy for the Armed Forces will need to reflect an improved twinning/pairing mechanism between Regular and Reserve units. Inevitably it will involve the rationalisation of some of the Reserve estate. Once steps have been taken to rebuild the officer and non commissioned officer base of the Reserves, there should be a review of the size of the requirement for Regular permanent staff in Reserve units. We foresee the far greater use of ex-Regulars in Reservist units, both to improve the quality and experience levels within units and eventually to reduce the need for Regular permanent staff.
77. **Career Planning and Policy Issues.** To manage a sizeable force of Reservists requires changes to personnel policies and procedures. Acknowledging that Reservists are different is critical and although some processes can be mirrored, many cannot for the simple reason that they are designed solely to deal with full-time Regular, service men and women. This is apparent in the Army where there are also a range of policy issues which will need consideration and change. One significant such issue is the need to re-introduce the policy of TA primacy for Commanding Officer appointments and a mechanism to oversee it – see Annex A. But there are wider policy issues such as those relating to the Terms and Conditions of Reservist Service that will in future need to be more flexible in order to allow a greater flexibility of employment within different elements of the Whole Force. The bureaucratic nature of Reserves personnel management is not confined to problems with the enlistment system. By seeking to adapt all aspects of

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13. Strategic Review of Reserves, 2009, para 20, chap 7, "The majority of the VE is underutilised. This is because of the part-time nature of Reserve and Cadet Activity. Facilities are left unused for much of the working week. Clearly this level of utilisation is inefficient and significant opportunities exist for increasing usage through the sharing of facilities, particularly in City areas." This evidence of significant spare capacity has been further proven during the work of the Volunteer Estate Modernisation Team.

Regular arrangements, Reservists, particularly officers, spend substantial amounts of time on reporting and administration. Further, many career management and transition procedures are lengthy and need to be supported by an agile Management Information System. The Commission recommends that reform is needed here. TA matters are currently dealt with by a single Military Secretary Reserves section at the Army Personnel Centre in Glasgow, where a single Reservist Colonel OF5 serves as advisor. We suggest that a Reservist, at Brigadier level, ideally with practical civilian personnel management experience, is appointed to take responsibility for this area and is given the brief to review all processes and simplify administration, ensuring that appropriate practices are established at all levels. Importantly, this appointment should provide strategic oversight of TA command appointments and the relevant boards advised, crucially to ensure that TA primacy is adopted and that wider TA management is developed. The new Deputy Commander Army Reserves should sit on the relevant promotion boards.

#### **Recommendations – TA and RMR Primacy and Career Management:**

Reintroduce TA primacy for unit commands and introduce it for RMR; (it still exists in RNR).

Appoint a 1\* TA deputy Military Secretary to take charge of advice to the MS on TA career management matters and to oversee TA primacy and review TA appraisal reporting procedures.

## **Stage 3: Realising the Potential**

78. In the previous two stages, we have identified the outline plan for delivering the immediate betterment and enabling packages required. Stage 3 looks at what we will need to do to build on these ideas in order to realise the longer term benefits of a larger Reserve. The recommendations we have made are a coherent, integrated package which will require implementation in full if the benefits are to be realised.
79. It will be critically important to start planning for further migration towards the Whole Force immediately. The current implementation of the Total Support Force<sup>14</sup> and the design process for the New Employment Model for Service Personnel will be significant components within the Whole Force development and are already going ahead as part of SDSR 2010. The results of the Basing Study and its implications for our troops returning from Germany by 2020 will also have to be taken into account.
80. To maintain coherence between these key transformation programmes, the Commission recommends that the Army should undertake further detailed work to show how it would make the further shift needed in Stage 3. This work should explain how it would mitigate operational risk and what improved force generation mechanism could be put in place to achieve the 1:8 force generation ratio<sup>15</sup> which the Commission assess is needed. The SDSR in 2015 will provide the opportunity to review the pace at which adoption could then be taken forward in light of progress in Afghanistan, and to reflect any other

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14. The Total support Force provides a fully integrated and sustainable military (Regular and Reserve), Civil Service (CS) and contractor support force E2E, in which the characteristics and strengths of each are optimised to deliver Defence Support in the Firm Base and which are deployable when necessary to meet specific operational requirements and conditions that provide Value for Defence whilst managing the risk to operations.

15. This force generation ratio represents a planning target to indicate the potential element of the Reserves that could be mobilised at a given time not necessarily the actual number mobilised.

unforeseen changes to the strategic context. In the view of the Commission, the post-2015 Regular:Reserve balance within the total Army should be in the region of 120,000 trained personnel in order to achieve the necessary resilience required in the Whole Force.

#### **Recommendation – SDSR 2015:**

The Regular:Reserve balance should be addressed in SDSR 2015 in order that the optimum Whole Force balance can be realised thereafter.

The post-2015 Regular: Reserve balance within the total Army should be in the region of 120,000 uniformed and trained personnel in order to achieve the necessary resilience required in the Whole Force.

81. We also assess that there is more scope to maintain important capabilities at a greater scale than currently planned in the RAF, by holding some elements at lower readiness and by using Reserve aircrews to man them. It has not been possible to establish the degree to which this could be achieved during this Study. The Commission therefore recommends that an independent body is invited to conduct a full analysis of the options that might be available in order to inform SDSR 2015.
82. The RN has made a proposal to provide support to a new coastal security role. Should the National Security Council support this proposal, the RN will need to undertake, with other Government Departments as necessary, a more formal assessment of the requirements and potential costs in order to inform the Ministry of Defence's response to this report. The long term benefits to the Nation of having a more effective and efficient coastal security system are self-evident.

#### **Vignette – Coastal Security:**

Although the Maritime Reserve is structured to support the Naval Service on operations worldwide, the FR20 review has highlighted the potential for personnel to also deliver a contribution to UK resilience operations and coastal security. From existing personnel who already have the skill sets and experience, the RNR is able to quickly the augment the recently established National Maritime Information Centre (NMIC) based in Northwood. Seagoing personnel are also able to augment the P2000 Inshore Patrol Vessels (IPV) and the River Class Offshore Potential Vessels; these 2 classes are able to deliver a patrol capability within our 12 nautical miles Territorial Waters and our 200nm Exclusive Economic Zone. In the case of the former, the use of RNR personnel allows the P2000s to move beyond their current role training university personnel into a coastal security contribution. Personnel from the Maritime Reserve, both sailors and Marines, can be trained to conduct port and riverine security duties, and to conduct boardings. The RNR Air Branch, which provides a range of support to the Fleet Air Arm, including aircrew, have the potential to augment airborne surveillance platforms engaged in coastal security. In short, the Maritime Reserve is able to provide a cost-effective contribution to UK coastal security at sea, in the air and on land.

83. To realise the full potential offered by assigning a formal role for Reserves in supporting UK Resilience and Homeland Security, it will be necessary for the Ministry of Defence to work with the other Government departments involved to define suitable policy and a strategic concept of operations. The higher profile that this will afford Reservists within their local communities should have significant long term benefits in developing a Society which is connected with and more supportive of Defence.



84. To realise the potential which Reservists offer in supporting sustained capacity-building overseas, it will be necessary for the Ministry of Defence to expand its current work in support of the Foreign and Commonwealth Office in the “Building Stability Overseas” policy to include the benefits that additional specialists will bring to such programmes. Adoption of a longer term sustained approach to capacity-building has the real potential to deliver substantial benefits in regions of strategic interest to the UK by ensuring stability and thereby improving our economic prosperity.
85. As the Ministry of Defence moves towards the Whole Force, opportunities to realise greater benefits for both industry and the Armed Forces will arise through strategic partnering. The Commission has identified that such partnerships have been extremely effective in other countries in allowing national defence industries to gain competitive advantage. Maintenance of mutually beneficial partnerships, designed to attract Reservists who aspire to middle management development programmes in their civilian jobs, also offers the potential to help with the recruiting surge needed and to rebuild the quality of officers entering the Reserves.
86. Lord Levene’s Defence Reform Review has highlighted the importance of viewing human capability as a strategic resource alongside and complementary to equipment capability. The restructuring within the Ministry of Defence and wider Armed Forces required by his Review will clearly bring this into sharper focus. However, it will also need proper management. We have been struck by the enormous difficulties that we have encountered in accessing useful Management Information about Defence manpower. The lack of an agreed costing model for both Regular and Reserve units and poor information relating to the levels of training that have been achieved, particularly within the TA, have thwarted a more rigorous analysis of cost benefits. In the future, the acquisition community will also need a more nuanced approach to the way they include manning considerations in their procurement decisions.

#### **Recommendation – MIS**

We recommend that resource is put into a more effective Management Information System to underpin the Whole Force, which will allow planners rapidly and easily to understand the impacts of assigning people on different types of Terms and Conditions of Service to any given post.

87. The use of the Reserves on operations in formed sub units and units and the more intelligent use of civilians and contractors will reduce personnel costs and make human capability more affordable in the medium to long term. The scale of this extension will be a political, rather than military judgement and in accordance with the direction received from the National Security Council, probably in the context of SDSR 2015. The principal factors informing the degree of re-balancing within the Whole Force will be its overall relative affordability and consideration of strategic and operational risk. We offer some illustrative details on personnel numbers and relative costs in the next Section.



# Section 3: Transforming the Reserves: Factors Affecting Implementation

## Introduction

88. In Section 1, the Commission outlined the context of the Reserves Review which establishes the case for change; Section 2 offered a vision for a reinvigorated Reserve, integrated within the Whole Force and indicated a three stage approach to achieving that vision. In this section, we set out:
- The manner in which we believe our recommendations for Reserve transformation should be implemented;
  - The issues which we consider warrant National Security Council attention and direction;
  - The cost implications of these recommendations, both in the short and long term, with an illustrative indication of the potential savings that future re-balancing might offer;
  - Our proposals for the governance arrangements which should guide implementation of our recommendations and guard against future neglect of the Reserves;
  - How we have considered integration within the Whole Force Concept.
89. In conducting our Review, we commissioned five separate work strands into the Maritime, Army, Air Force, Special Forces and Medical Reserves. This work provided the Commission with some excellent ideas for how Reserves might best contribute to the Whole Force, whilst also cautioning where the Services judge that risks outweigh benefits. These inputs have helped us agree a view for Reserves' transformation, Service-by-Service. In some places the Commission has been guided by the Services' views, in others we have gone beyond that advice by advocating greater innovation to achieve our vision of a reinvigorated Reserve transformed into an integral component of the Whole Force. The five environmental work strands are summarised at **Annex C**.

## Implementation

90. The Commission has set out an ambitious and innovative vision for reinvigorating the Reserves such that they enhance the Armed Forces' capability: harness talent from across the country; better integrate with Society; and make Defence more cost-effective. However, we are under no illusion about the difficulty in achieving this vision. The challenges include financial, organisational, operational, presentational, cultural and legal issues, to name but a few.
91. The degree to which the Commission's recommendations are adopted will depend upon political and military will to deliver, balanced by the keen eye of many who have a heartfelt interest in Defence. We strongly advocate that all of the measures proposed are adopted by Defence – piecemeal selection of the easy or the shiny options will not address the problems which now afflict much of the Reserves. The remedial package must be comprehensive, deep and sustained. This will take significant leadership, vision, commitment and endurance.
92. The three stage approach to reform set out in Section 2 provides a suitable framework for implementation. If there is to be a decisive point within the package, it rests at the likely time of the next SDSR, which is assumed to be 2015, and should be after the completion of combat operations in Afghanistan.
  - a. The first two stages – investment/betterment and enabling the future – must be adopted if the Reserves are not to be consigned to obscurity and irrelevance. We firmly believe that this investment must be made; legislation, terms of service and roles modernised; support to employers enhanced, and the Government/Society/Reserve relationship restored with new governance proposals overseeing the process.
  - b. The third stage – moving consciously and deliberately to a true Whole Force, necessitating the adoption of a different balance of forces – will need further political review after force reductions in Afghanistan. This will probably form a key part of SDSR 2015. However, there is considerable conceptual and practical work required in the preceding years to assess the degree of change necessary, and the milestones to realise the re-balanced force by 2020. The total size of our Armed Forces after that point is a matter for that review, but, whatever the size decided on, we believe that rebalancing the proportion between Regular and Reserve is in the national interest and, as indicated earlier, a target strength of a total trained Army should, in the Commission's view, be in the region of 120,000. The Commission recognises Defence will have to make necessary changes on the allocation of resources as the Implementation Plan is developed and enacted.

## National Security Council Considerations

93. The Commission is very conscious that a number of its recommendations are matters which impact on National Security, that change the construct of the military role in Homeland Security and UK Resilience, enhance Defence's contribution to stabilisation including preventative capacity building, and, potentially, recalibrate the Regular:Reserve balance such that we redefine the nature of the bargain between Government, Society, the Reserves and National Employers. We, therefore, recommend that National Security Council consideration of these issues must form a part of the initial Government response

to our report. Without such a response, the nature and ambition of implementation plans cannot be set.

94. Specifically, the Commission believes that the National Security Council (NSC) needs to tackle the following issues:
- a. Does the National Security Council accept that the case for change and remedial action is made? If so, does it therefore recognise the need to spend over £500M during the first 4 years on betterment and enabling further change?
  - b. Is the NSC content to consider changing the Regular:Reserve balance, recognising that this involves taking some military risk and raising the political threshold for committing to certain sorts of operations?
  - c. Does the NSC agree further work is required between Departments to identify to what extent the Reserves should be attributed against the following new roles:
    - (1) Homeland Security including a role in Coastal Security?
    - (2) UK Resilience?
    - (3) Operational use at sub-unit and, possibly unit level, where appropriate?
    - (4) Specialist contributions to emerging requirements including sustained preventative capacity-building overseas, cyber operations and humanitarian relief?
    - (5) National regeneration of large scale capability and capacity held within the Reserves?
  - d. Does the NSC recognise the important link between Reservists and wider society and that a viable and vibrant Reserve helps legitimise the ownership and use of Armed Force? Does the NSC support the need to maintain a dispersed volunteer estate footprint which may present an opportunity cost in limiting its rationalisation?

#### **Recommendation – Roles:**

The National Security Council should examine the proposed Reserves' roles and consider a shift in the Regular:Reserve balance (within a more integrated Whole Force structure), given the national security implications of both.

## Costs

95. In Section 1, the Commission set out the extremely challenging economic situation affecting Defence. Service pay and pension costs are set to rise faster than inflation, making the overall Defence programme increasingly unaffordable. This has spurred the need to find innovative ways of reducing the manpower costs of military capability.
96. In addressing the financial challenge faced by the Department during SDSR, the Ministry of Defence generated a number of savings measures against the full range of capability areas with those levied against the Reserves totalling £280M over 4 years from 2012. These measures were for the most part deferred to come into effect from financial year 2012/13 in light of this Review. These measures would need to be reprieved in light of the recommendations of the Commission.

97. Considerable work was undertaken during the Review to develop an initial Regular:Reserve Cost Comparison Model. The Cost Comparison Model builds from the basic costs of the individual, through their *employment*, and finally considers the costs of *deployment* at individual and unit level, using known costs to produce the capability at steady state. The model, based on a light infantry battalion, has been subjected to Defence Science Technology Laboratory scrutiny and an external audit by a qualified appointee of the RFCA. However, no qualitative judgements or force generation and rate of use assumptions for operational deployment were applied. Within these constraints, this work indicated that the steady-state costs of a TA infantry battalion are 20% of those of a Regular battalion of similar size. The costs of a TA infantry battalion mobilised for 12 months, including a six month operational tour, are 87% of a Regular battalion over the same period. The costs of using a formed unit of TA soldiers will increase when force generation factors and rates of use are taken into account. Once the TA has been attributed against specific Military Tasks, the Ministry of Defence will have to review the possible training and cost implications of integrating Reservists across all arms and services.
98. Work conducted using the Cost Comparison Model led to the development of a number of key initiatives and indicative costs to improve the utility of the Reserves. Each of the single Services have identified an Investment and Betterment package that will reverse the decline and increase the size of the Reserves. The packages should go some way to reinstating the Proposition by providing better training and improved career opportunities. This initial package would cost approximately £309M over 4 years from 2012.
99. In summary, the Ministry of Defence starts from a budgetary position where, in broad order terms, savings of £280M over 4 years have been scored against the Reserves and most of these will need to be reprieved. The detail of the additional funding requirements (£309M + £280M) is at Annex B. The Commission believes that the prioritisation of the additional funding must be an issue for the Ministry of Defence to judge during implementation, since scarce resources must be targeted at the areas of most critical need.

#### **Recommendation – Resources:**

Additional resources are required immediately to stabilise and then improve the state of the Reserves, (including the reprieve of previous measures).

100. Thereafter, in the third stage post-2015, if the right conditions are set, significant economies could be made in the overall force structure. Fundamentally Reserves are inexpensive to own and more expensive to use, but less overall than holding large scale military capability at high readiness. Cost efficiency, therefore, rests on a number of factors:
  - a. The Defence budget must remain responsible only for the costs of ownership of the Reserves. If they are mobilised for operations, then the additional costs will need to be met by Contingency Funding as is currently the case. In this context the issue of who pays for actual tasks on civil contingency needs to be resolved. We recommend that the civil authorities reimburse marginal costs only and that elements of the costs of civil contingency tasking are held in the Ministry of Defence core budget.
  - b. The implication of this is that the majority of Reserve Forces will not routinely be mobilised or brought to high readiness unless the Nation commits to a sustained operation of a certain scale. However, we should consider, within the pairing mechanism of a more integrated force, giving elements of the Reserve an increased level of training, so that they could be ready for mobilisation more quickly.

- c. Separately, the overall efficiency of Reservist basing, training costs and force generation are critical in improving cost-effectiveness; and these areas will need rationalisation and improvement, once administrative reforms have been implemented.
101. Notwithstanding these factors, the potential benefits to the core Defence Budget of a rebalanced force are considerable. The table below simply gives some illustrative examples of how a rebalanced Army might look (before further optimisation of the force generation factors, training wastage, reduced estate requirement and other aspects are taken into account), and the scale of savings which could be achieved. The figures are only illustrative, since they do not reflect the requirement to reprove the savings measures and run on some of the betterment costs.

Illustrative Model	Regular Component -Trained	Reserve Component – Trained/Untrained	Overall Army Strength - Trained	Potential Savings
1	94 K	20 K / 7 K	114 K	Baseline
2	84 K	32 K / 10 K	116 K	£335M per year
3	75 K	41 K / 14 K	116 K	£650M per year

#### Recommendation – Manpower Costs:

Develop a transparent manpower (Regular, Reserve, Civilian and Contractor) cost comparison model as one of the factors to help planners achieve an optimal Whole Force manpower balance.

## Governance

102. Since 1908 RFCAs have undertaken an important role in supporting the Reserves (and Cadets), both through the provision of property, facilities and services and through their ability to generate regional support from communities. As membership organisations, their volunteers use their regional influence to maintain relations with civic bodies, employers and welfare organisations in order to enhance support to all three Services. Their continued support will be an essential component in enabling the changes demanded of FR20, not least on estate modernisation, and they have therefore been involved in FR20 work from the outset. Their utility is now also exploited by the Army in support of 'Firm Base', building on their contact network to better support Regular personnel and families as well. Essential as this support structure is, RFCAs are arguably as important in acting as advocates for the Armed Forces, in helping connect them to the Nation, and for the provision of advice on these matters to the Defence Council.
103. Our Commission believes that, as recent events have shown, there is a real risk that subsequent implementation of the Reserves Review and the downstream protection of a revised Reservist Proposition may falter, if strong independent governance is not established. We need to ensure that our Reserve Forces do not again become an easy resource regulator. We also need to ensure that the structures put in place will remain dynamic and adaptive over time, to ensure that the essential direction from this Review is maintained, while recognising that the Reserves will become a core component of the Whole Force.

104. The Commission recognises that there is a clear requirement for a report to be laid before Parliament, annually, on the overall ‘health’ of the Reserves. This requirement is best fulfilled by an updated version of the Council of RFCAs which is already charged by (non-discretionary) statute to provide independent advice to the Defence Council and Ministers on Reserve matters. Constituted in accordance with the provisions of the Reserve Forces Act (1996), the Council will be well placed to deliver oversight of how the Ministry of Defence is delivering the Reservist Proposition and implementing the accepted recommendations of this Review. Enabling this will require comprehensive new direction from the Defence Council to the RFCAs and the Council, thus providing an opportunity to refresh that direction across the breadth of their Reserves responsibilities.
105. In addition to the revised external governance arrangements, outlined above, the strategic level internal governance system should be transformed to take account of both the change to the external governance and the recently endorsed Defence Reform Review proposals for the future High Level Defence Operating Model. The Commission recommends the establishment of a permanent Reserves Executive Committee, at the same level as the Service Boards, which reports to the Defence Board through the Chief of Defence Staff’s Armed Forces Committee. The Reserves Executive Committee should be Chaired by the Vice Chief of the Defence Staff with a membership that provides an appropriate mix of knowledge and independence, thus including: an appointed Non-Executive Director; both senior Regular and Reserve serving officers; an appropriately experienced retired senior officer, and NEAB and Council of RFCAs representatives. In addition, we welcome the important establishment of the new 2\* post of Deputy Commander Army Reserves as Head of the TA. We believe that the appointment mechanism for the four most senior Reservist officers – the ACDS (R&C) and the 3 single Service Reservist Heads – needs to be reviewed in accordance with the changes for Senior Appointments announced in Defence Reform. In addition, we have made a number of detailed proposals to safeguard and enhance the position of senior Reserve officers, including a new Deputy Military Secretary.

#### **Recommendation – Governance:**

Governance is required to: first, oversee the implementation of the Commission’s recommendations; second, provide an independent mechanism to report to the Ministry of Defence and Parliament on the state of the Reserves; third to help ensure the appropriate influence of certain Reserve appointments. The appointment mechanism for the four most senior Reservist officers – Assistant Chief of Defence Staff (Reserves and Cadets) and the 3 single Service Reservist Heads – needs to be reviewed in accordance with the changes for Senior Appointments announced in Defence Reform.

## **Integration and the Whole Force Concept**

106. Throughout this report we have used the word ‘integrated’ and the phrase ‘Whole Force Concept’ quite liberally. This has been done deliberately, because both represent concepts rather than rigidly definable structures. We do not want to pre-determine the degree of integration that every part of the Reserve component will enjoy with its Regular component. For example, individual Reserve specialists may have a very

loose association with Regular Forces, indeed their mobilised role may be with another Government Department altogether. In contrast, we absolutely encourage formalised pairing mechanisms within the cap-badges of the Combat Arms.

107. The concept of the Whole Force is that the size and nature of its component parts – Regular, Reserve, civilian and contractor – are dynamic over time. The key is that, at any moment in time, the aggregation of the component parts represents the most operationally relevant and cost efficient blend of our national human resource. The Commission believes that such a concept must be at the very heart of how the Ministry of Defence manages its human capability.



# Annex A to FR20 Final Report

## Summary of Wider Recommendations

1. **General.** The Commission’s Review has concluded that there are a number of actions that must be taken to arrest the decline of the Reserves in the short-term and to structure the Reserves properly and maximise their contribution to Defence in the longer-term. These are as follows:

Serial No	Commission Recommendations	Reference
1	<b>Whole Force Concept (WFC) Adoption.</b> The Ministry of Defence must now direct and implement the adoption of the WFC. Implementation will require optimisation of the Regular, Reservist, civil servant and contractor mix, balanced against operational risk and affordability.	Para 53
2	<b>Resources.</b> Additional resources are required immediately to stabilise and then improve the state of the Reserves, (including the reprieve of previous measures).	Para 99
3	<b>Revised Proposition.</b> We recommend a reformulation of the Proposition to embrace opportunities for leadership and command, as follows: “Defence will offer the challenge and reward which attracts people to volunteer, and undertakes to train and support them throughout their Service, including when mobilised and recuperating; <i>it must offer greater opportunity, for command and leadership, in order to fully satisfy the volunteer ethos.</i> ”	Para 58
4	<b>Roles.</b> The National Security Council should examine the proposed Reserves’ roles and consider a shift in the Regular:Reserve balance (within a more integrated Whole Force structure), given the national security implications of both.	Para 94
5	<b>Attribution.</b> All Reserve force elements must be attributed to specific roles which should include: specialist tasks, contribution to deployed and contingent operations, UK Resilience and Homeland Security, regeneration, Connecting with the Nation.	Para 57
6	<b>Increased Manning Levels.</b> The size of the Reserves must be increased so that their trained strength matches Defence’s requirement, making them viable entities, better able to sustain Defence outputs. By 2015, Reservist trained strength should be: RNR/RMR 3,100; TA 30,000 and RAuxAF 1,800.	Para 65

7	<b>Governance.</b> Governance is required to: first, oversee the implementation of the Commission’s recommendations; second, provide an independent mechanism to report to the Ministry of Defence and Parliament on the state of the Reserves; third to help ensure the appropriate influence of certain Reserve appointments. The appointment mechanism for the four most senior Reservist officers – Assistant Chief of Defence Staff (Reserves and Cadets) and the 3 single Service Reservist Heads – needs to be reviewed in accordance with the changes for Senior Appointments announced in Defence Reform.	Para 105
8	<b>Legislative Change.</b> Legislative changes are required to enable better use of Reservists in support of Defence outputs at home and abroad, whilst protecting Reservists’ and Employers’ interests.	Para 68
9	<b>Employer Recognition.</b> Formal recognition of Reservists employers (such as a ‘Kitemark’) is required, to include Government Departments and local authorities who employ Reservists. Employers should be encouraged to consider military volunteering as an important element of the social action plans.	Para 68
10	<b>SDSR 2015 Preparation.</b> <ul style="list-style-type: none"> <li>● The Regular:Reserve balance should be addressed in SDSR 2015 in order that the optimum Whole Force balance can be realised thereafter.</li> <li>● The post-2015 Regular Reserve balance within total Army should be about 120,000 trained personnel in order to achieve the necessary resilience required in the Whole Force.</li> </ul>	Para 80
11	<b>Formed Sub-Units.</b> Commit to returning formed sub-units to ‘the fight’, and continue to use units in more permissive environments entailing a return to collective training at unit and sub-unit level: TA and RMR, plus some opportunities in RNR and RAuxAF.	Para 57b
12	<b>Recruiting, Marketing and Training.</b> <ul style="list-style-type: none"> <li>● Restore funding for recruiting and marketing to enable the Investment and Betterment measures to be implemented.</li> <li>● In the short-term, reinvigorate the Reservist recruiting and training pipeline to halt the decline and rebuild numbers.</li> <li>● For the longer term, determine the strategy to enable the Recruiting Partnering Project to fully support Reservist recruiting.</li> <li>● Make rapid changes to existing administrative processes and regulations to make it more attractive for ex-Regulars to join the TA.</li> </ul>	Para 70
13	<b>Partnership Recruitment and Training.</b> That the Ministry of Defence engages with large Employers of Reservists and Defence Industry under the Defence Career Partnering initiative to establish pilot programmes to deliver ‘Partnership for Talent’ as soon as possible. This will form a key part of the recruiting drive for Reservists required as part of Stage 1 of FR20 implementation.	Para 62
14	<b>TA &amp; RMR Primacy.</b> Restore TA primacy for unit commands and introduce it for RMR; (it still exists in RNR).	Para 77

15	<b>Career Management.</b> Appoint a 1* TA deputy Military Secretary to take charge of advice to the MS on TA career management matters and oversee TA primacy and review TA appraisal reporting procedures.	Para 77
16	<b>Rebuild Officer and Soldier Training.</b> <ul style="list-style-type: none"> <li>● Allow Officer Cadets who are not students to join University Officer Training Corps (UOTC), as a temporary measure, until the full UOTC Study recommendations have been implemented.</li> <li>● Introduce special to arm training for Reservists aligned to university summer vacation/post-graduation breaks, and summer holidays for those officers and soldiers not in further/higher education.</li> </ul>	Para 72
17	<b>Critical Mass.</b> Increase the Reservist sub-unit size to produce greater critical mass for training, disbanding some poorly recruited national units to release liability.	Para 64b
18	<b>Connecting with the Nation (CWN).</b> Allocate the Reserves a more formalised role in connecting Defence with society and the Nation at large.	Para 57e
19	<b>Manpower Costs.</b> Develop a transparent manpower (Regular, Reserve, Civilian and Contractor) cost comparison model as one of the factors to help planners achieve an optimal Whole Force manpower balance.	Para 101
20	<b>UK Resilience Funding.</b> That the Ministry of Defence core budget contains funds to cover the cost of 5,000 Reservists being used for 5 days per annum.	Para 57c
21	<b>E-Training.</b> Deliver improved individual training and education via the internet, simulation and synthetic environments.	Para 72
22	<b>Civilian Skills Database.</b> Continue to develop a data capture process to enable recording of civilian skills.	Para 57a(2)
23	<b>Enhancing Defence Technological Advantage.</b> Work with key partners to establish accredited development schemes to enhance Defence technological advantage, similar to Israel's Talpiot programme.	Para 57a(3)
24	<b>Employer Feedback.</b> Give employers greater feedback on what their Reservist employees have completed during training, describing any competencies and skills gained.	Para 68
25	<b>Volunteer Reserve (VR) Decorations.</b> Consideration is given to the reinstatement of Volunteer Reserve decorations (ie Reserve Decoration (RNR/RMR), Territorial Decoration and Air Efficiency medal) for long service and efficiency, recognising the different sacrifices made by Reservists.	Para 59
26	<b>MIS.</b> We recommend that resource is put into a more effective Management Information System to underpin the Whole Force, which will allow planners rapidly and easily to understand the impacts of assigning people on different types of Terms and Conditions of Service to any given post.	Para 86
<b>Environmental Recommendation</b>		
27	See Commissions' specific Environmental recommendations at	Annex C

# Annex B to FR20 Final Report

## Outline Cost of Betterment and Enablement

	Year 1 - 2012/13	Year 2 - 2013/14	Year 3 - 2014/15	Year 4 - 2015/16
<b>RN - Accelerated Development Package:</b> additional funds to accelerate Recruitment and Initial Training plus focussed training for RMR non-commissioned officers in order to significantly improve current contribution to Operational Capability.	1.38	1.38	1.38	1.38
<b>RN - Increased Reserves Utilisation in Current Ops:</b> generates additional capability in C4ISTAR, RNR Air Branch, generates a Disaster Relief / Counter Narcotics formed sub-unit, builds contribution to UK Resilience and Coastal Security, includes Estate rationalisation.	1.61	-1.92	-0.13	-0.87
<b>RN Longer Term Measures:</b> generates further capability in C4ISTAR and Cyber, expands RNR Air Branch roles including Wildcat, delivers additional Media Operations Specialists and strengthens the Regular supporting spine.	0.00	0.20	0.20	-0.06
<b>TA Betterment:</b> increase TA Phase 1 trained strength to 30K, including OH/dental care, operational welfare support, physical training equipment, and opportunities for TA to use their civilian skills for mobilisation.	16.10	33.92	33.72	36.46
<b>TA Enhancement:</b> increase in TA attribution against Military tasks and deliver better integrated CT2/3 training for the 30K trained strength.	3.00	9.00	15.00	21.00
<b>RAF Get Well Package:</b> Restore RAF Regiment to full manning; restoring funding for training; restoring marketing & recruiting budget; restoring 600 Squadron to full manning (an HQ Support Squadron that provides manpower to RAF static and mobile HQs at home and overseas.)	6.10	6.10	6.10	6.10
<b>RAF Increasing Resilience and Strength:</b> including increasing the numbers of Reserves in Medical, Intelligence and Police; substituting Regular posts for Reservist posts across the Royal Auxiliary Airforce	9.44	4.39	-0.90	-0.90
<b>RAF Longer Term including creating New Squadrons:</b> eg Cyber Security; Aerial Erector Support; Tactical Fuel Support.	8.06	8.06	8.06	8.06

<b>Defence Medical Services:</b> delivery of a Humanitarian Relief (field hospital); offering advice alongside other Government Departments in support of health sector reform in failed and failing states; provision of Chemical, Biological, Radiological & Nuclear decontamination which, in the event of a major or extended incident, could be deployed in support of Fire & Rescue Services.	11.87	4.10	13.81	5.16	
<b>Central Measures:</b> including 5000 troops for Resilience; restoring Employer Support provision to 2009/10 levels; Special Forces enhancements	8.04	8.55	8.54	8.06	
<b>PR 11 Measures</b>	40.00	66.00	86.00	88.00	
<b>Totals (£ Millions)</b>	<b>105.61</b>	<b>139.78</b>	<b>171.78</b>	<b>172.38</b>	<b>589.55</b>

Note: Costs to fund all measures would total approximately £1,800M over 10 years. The Commission believes that the prioritisation of the additional funding must be an issue for the Ministry of Defence to judge during implementation, since scarce resources must be targeted at the areas of most critical need.

# Annex C to FR20 Final Report

## Recommendations by Environment

1. The Commission recognises that transformation cannot take place overnight; it will take commitment, vision, resources and energy. Against the framework of the three stages of reform proposed, the Commission has identified below what it believes its potential changes to be for each of the Services, Special Forces and the Defence Medical Services.

## Royal Navy

2. **Overview.** From an assessment of the current state of the RNR/RMR, the Commission views the Maritime Reserves as well placed to transform further, as in many ways, they are already operating in the manner in which we envisage in the future. The Maritime Reserve is already integrated well within the overall Naval structure and delivers consistent operational effect against an up to date set of requirements. We envisage the Maritime Reserves being brought up to strength in the short term, with the RNR shortly assuming a portfolio of specialist roles currently ascribed predominantly to the Royal Navy. In the medium to long term, more innovative Reservist utility should be possible by giving the RNR and RMR clear cut roles in Coastal Security and UK Resilience. Overseas, greater Maritime Reserve involvement in disaster relief, counter-narcotics and counter-piracy is envisaged, coupled with a significant contribution to enduring operations. Increased command opportunities through changes in unit structures and the delivery of existing and new capabilities will improve the Reserve Proposition that is so vital, particularly at the level of junior leaders. This should include introducing Reserve primacy to the RMR and seeking more opportunities for formed bodies of the RMR and certain parts of the RNR to deploy. We welcome the plans the Navy has outlined in order to achieve the latter point. Overall the dynamic operational responsibilities of a re-vitalised Maritime Reserve will underpin its continued effectiveness as an integrated component of the whole Naval Service. The Commission does not anticipate larger Naval vessels being wholly crewed by the Reserve – the low number of large vessels in the Navy and their resultant high readiness level generally militate against it. However, the existence of a pool of trained and accessible augmentees for larger vessels – whether from the RN Volunteer or Fleet Reserves – would appear sensible.
3. **Investment and Betterment.** The manning of the RNR and RMR needs attention in order to achieve its current liability by 2015; (together they are about 500 personnel below their trained liability). Filling this gap will need a focus on innovative and appropriate means to more effectively recruit and retain personnel, streamlining administrative hurdles and better enabling the transfer in of ex-Regular personnel – this will require an immediate, but modest, uplift in funding. The RNR permanent staff structure is already exceptionally lean and leaves no room for reduction. However, in the RMR we believe that a reduction of at least one HQ and some permanent staff could be achieved in order to provide some cost efficiencies whilst not diluting operational output. Like the TA, the RMR needs to build up its officer base and the plans it has to make more use of formed troops on operations will help with this.

4. Further adoption of the Whole Force Concept within the Maritime Reserves will improve the training of the RMR non-commissioned officers to enable them to better integrate within RM units and increase their utility in key unit support roles. Optimisation of the Maritime Reserves with low operational risk against delivering Defence's outputs, will see the broadening of Reservists' roles. We believe that the following changes to the delivery of military capability should be immediately taken forward:
  - a. Increasing use of Reservists particularly in C4ISTAR<sup>16</sup> and greater use of Reservists in the Air Branch as the current RN rotary wing aircraft are updated and replaced;
  - b. Consideration of how in the future, Reservists (RN and RAF) might contribute to helicopter Search and Rescue (SAR), including the use of Sponsored Reserves;
  - c. The training and delivery of formed sub-units in the RNR and RMR (eg force protection/boarding parties) to enhance utility, ethos and command opportunities;
  - d. Greater integration of the Reserves with the Naval Regional organisation to deliver cost and operational benefits, especially in connecting with society and supporting recruiting;
  - e. Changes to the RNR Unit roles and Branch Management to deliver training efficiencies and provide a clearer interface between the Maritime Reserve and the functional employers in Fleet and Defence. It is important that changes to the RNR Branch management structure should not undermine the Volunteer Reserve leadership of the Branch and their ability to ensure the delivery of Phase 2 training;
  - f. Developing a Reserve counter-narcotics capability to support the UK seasonal interest in the Caribbean;
  - g. Developing a low-cost initial Reserve contribution to Coastal Security and UK Resilience. (If the NSC approves a larger contribution to coastal security, then important decisions will need to be made regarding the replacement for the P2000 patrol boats and the forthcoming DEFRA contract for fishery protection vessels); and,
  - h. Support to overseas stabilisation and disaster relief.

Unit relocation and co-location will generate minor savings in overall manpower costs with a one-off infrastructure cost. The proposed enhanced structure would, however, provide an effective 'base-plate' for further development of the Reserves in the coming years.

5. **Enabling the Future.** To ensure that the Maritime Reserve presents a compelling prospect for future recruits, the RN will continue to increase its use of Reservists in a number of key areas. These are expected to include their greater use in C4ISTAR, UK Resilience (as possible Second Responders), Capacity Building and Coastal Security. There a number of other areas where Reservists could be employed cost effectively, especially in niche capabilities such as Cyber and Media Operations. Another opportunity is to expand the Air Branch to provide additional support to the Fleet Air Arm and through the establishment of a Reservist Wildcat flight held at lower readiness.
6. **Realising the Potential.** Building on an impressive starting point, additional work will be required to expand the Whole Force Concept further within the RN, especially regarding the use of Reservists to provide sea-going manpower on warships. Any additional significant change in the manpower mix will require careful consideration and will have to be balanced against the operational requirement, risk and affordability. Nevertheless,

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16. Command. Control, Computers, Communications, Intelligence, Surveillance, Target Acquisition and Reconnaissance.

Reservists should be used more widely in areas that deliver less complex capabilities.

7. **Maritime Reserves Summary.** The RN is well advanced in adopting the Whole Force Concept and should be able to deliver the Betterment and Enabling the Future packages relatively easily.

## Army

8. **Overview.** The Army sees this review as a generational opportunity to harness the very best from the pool of national talent. Its vision is for a fully integrated Army whose Reserve component, optimised to deliver assured capabilities across all military tasks, is integrated completely on operations and in training; is enabled by appropriate legislation and Terms & Conditions of Service to guarantee availability; makes best use of the widest talent pool within the UK; Defence in the local communities; and, has sufficient and sustainable resources to deliver the Reserve Proposition. In planning for the transition to the Whole Force, the Army recognises that current Regular and Reserve structures and lay down will need to change, and that this will result in difficult choices for both components. The culture of both the Regular and Reserve components will need to adapt to embrace integrated and flexible ways of working, with successful reconciliation requiring compromise on both sides.
9. **Investment and Betterment.** To achieve a truly integrated force, whilst maintaining Defence's current focus on achieving success in Afghanistan, the Commission understands measures will need to be applied incrementally; but some can, and must, be implemented as soon as possible. The short term priority is to address the TA manning crisis which will require remedial action to build the TA's trained strength to a target of 30,000 by 2015 – an intentionally challenging target set by the Commission. The requirement to optimise and modernise the Reserves' infrastructure will inevitably lead to the improvement of some TA Centres, but the closure of others. Allowing for some 8,000 recruits, this will leave the liability broadly unchanged to the pre-SDSR numbers. We believe it will not be possible to achieve this without immediate and substantive measures to bring meaning to the Reserve Proposition. Specific measures should include:
  - a. An increase in marketing, consideration of financial incentives, employment of additional recruiting staff and improving the effectiveness of the Phase 1 training pipeline;
  - b. Devoting more resources to recruiting and creating greater Phase 1 training capacity;
  - c. Allowing all Officer Cadets to join UOTCs and rescheduling Regular special to arm training to start in June to fit in with summer vacation/post-graduation, and summer holidays for those officers and soldiers not in further/higher education;
  - d. Devoting more resources to improving retention including the provision of the same level of medical and dental support in pre-mobilisation, providing additional sports equipment to improve individual fitness – backed by sanctions against those who fail to keep in shape – and welfare support to TA families whilst they are deployed;
  - e. Providing greater opportunities for Reservists to use their civilian skills and qualifications for mobilisation and employability on operations by recording individual Reservist civilian skills on a central database and improving contact management with Reservist Employers; and,



- f. Increase TA attribution against military tasks and deliver additional operational collective training.
10. **Realising the Potential.** It is recognised that, for the Army, this is just the start of a transformation of its forces through the adoption of the Whole Force Concept. It has embarked upon a programme of innovative force development to identify the design principles and force structure options to inform the next SDSR. In the limited time available, the Army has focussed its attention on the short-term, the immediate Investment and Betterment phase, to ensure that appropriate cultural and organisational changes are delivered to set the conditions for the adoption of the Whole Force Concept as soon after 2015 as possible. The Army's real challenge will be the attribution of roles, delivering the Proposition and achieving proper integration.
  11. **Army Summary.** The TA is in decline and urgent steps should be taken now to redress the problem. The Commission's target of 30,000 TA by 2015 is challenging and will require significant resources and commitment to deliver. However, we judge that this has to be done if the TA is to remain viable and deliver its part within the Whole Force Concept. Further work is now required to develop the Whole Force approach comprehensively within the Army to allow the more significant shift in the Regular:Reserve balance required from 2015.

## RAF

12. **Overview.** Like the RN, the RAF has already adopted the Whole Force Concept to a degree, with significant elements of non-Regular manpower integrated into the force structure. It will continue to develop this approach and use the opportunity of the introduction of new equipment to expand the Reservist role. The RAF sees the implementation of a betterment package as an essential part of redressing the existing financial shortfalls in the delivery of current military capability. Wider adoption of the Whole Force Concept will continue in the medium to longer-term.
13. **Investment and Betterment.** The RAF should ensure that its Reserve reaches its liability of 1,800 by 2015. The delivery of an immediate betterment package will enable the RAF to do this through increased recruitment activity and improved retention, which should rapidly restore the wider utility of the RAuxAF and reduce risk to Front Line output. For a small additional increase in both funding and Reservist numbers, the RAF will provide additional capability required to meet the new Defence Planning Assumptions across a number of different areas which include:
  - a. Increasing medical reserves by 47 personnel a year earlier than planned;
  - b. Increasing intelligence Reservists by 20 personnel;
  - c. Increasing RAuxAF Police establishment by 50 personnel;
  - d. Transferring 200 RAF Regular posts to an appropriate full time reserve commitment;
  - e. Delete 2 RAuxAF Force protection squadrons and create 2 RAuxAF hybrid squadrons in N Ireland and NW England; and
  - f. Transfer 18 junior aircrew posts on 100 Squadron to an appropriate full time reserve commitment.

- g. Consideration of how in the future, Reservists (RN and RAF) might contribute to helicopter Search and Rescue (SAR), including the use of Sponsored Reserves.
14. **Realising the Potential.** We believe further work is required to determine which Regular posts could be filled from the Reserve with compensating savings. In particular, the possibility of backfilling posts using Reserves to cover home surge deployments in high-readiness units, along the lines of the RN Air Branch should also be determined, as should the likelihood of any savings being made using mixed manning of rotary assets. Wider implementation of Whole Force measures presents an important opportunity to retain operational experience as it migrates out of the Regular force, and to have access to specialist knowledge outside the Regulars. We are convinced that more needs to be done to engage with the 500,000 personnel employed within the civil aviation industry in order to realise a more cost effective solution to our air power needs.
15. **RAF Summary.** The RAF has started to adopt the Whole Force Concept to a degree, especially in the manner in which it routinely uses (cheaper) mostly full-time Reserve personnel to fill posts where continuity, specific experience and/or special skill sets are required. Although its Volunteer Reserves are making a significant contribution to output, the Commission's view is that the RAF has been restrictive in some areas of Reserve employment. There is greater scope to utilise ex-Regular flying and ground-crew expertise than the RAF has so far been willing to accept. The Commission believes that greater exploitation of the ex-Regular stream and some further transfer of capability to the RAuxAF would provide both savings and greater depth of capability. From the experience of other nations, we assess that greater capacity would be affordable if some capabilities were held at lower readiness. We strongly recommend that a follow up, independent study, be conducted in order to evaluate in full the prospects for a much more radical shift of Regular capability, including fast jets, into the Reserves. This will necessitate a rigorous analysis of the best way of generating aviation assets at different levels of readiness in the future.

## Special Forces

16. **Investment and Betterment.** The Commission welcomed the SDSR additions to the support elements of our Special Forces and we commend further enhancements to the Special Forces Reserve. We recommend a number of minor structural changes and the retention of the 2 Special Forces Reserve Regiments in their current form. We suggest increasing the number of Special Forces Reserves overall to better integrate them with the Regular front line units. We recommend the reorganisation of the Reserve communications unit to provide integrated support to the Reserve Regiments.

## Defence Medical Services

17. **Overview.** Defence Medical Services has already embraced the Whole Force Concept and continues to exploit and successfully develop the advantages that widespread use of civilian medical expertise offers. We particularly welcome recent initiatives to build closer ties with elements of the NHS, the Royal Colleges and others in order to improve the Proposition for Reserve medical personnel.

18. **Investment and Betterment.** Defence Medical Services has identified a number of key areas where additional capability is needed to enhance the Government's response to either a UK or international natural or man-made disaster. Central to these proposals is the ability, held at a suitable readiness level, to deliver Humanitarian Relief based on the current Field Hospital model. Although all the other costs would be born by the Defence budget in the ordinary way, the National Security Council should consider whether readiness costs and – if used – mobilisation costs (including stores expended) could fall on the International Development Budget. Other shorter-term benefits have been identified and Defence Medical Services will work with the NHS to further develop the proposals, which include:
- a. Enhancing the relationship between the Defence Medical Services, Ambulance Trusts and helicopter Emergency Medical Services by increasing numbers of both Reservists and Regulars on placements to deliver potential benefits to both parties;
  - b. Creating and developing military Hazardous Area Response Teams from both Regular and Reserve cohorts, which can be delivered at nil cost;
  - c. Improving the deployability of an existing Chemical, Biological, Radiological and Nuclear capability in support of civilian Fire and Rescue Services in the event of a major or extended incident;
  - d. In the event of a major incident, Defence Medical Services' personnel could provide command level planning and coordination of military medical assets within the overall Incident Command, led by the Police;
  - e. Providing experienced Public and Environmental Health staff to increase domestic resilience in managing potential major disease outbreaks; and,
  - f. Providing Senior Medical Leadership in an advisory capacity to support DfID/FCO in health sector reform for failed or failing states.
19. **Realising the Potential.** The ongoing Defence Medical Services 2020 Strategic Manpower Review, which is due to report in 2012, may identify additional areas where Reservists can be better integrated into the Whole Force, including their recruitment, military training and attribution to specific military tasks. For example, lessons identified from current operations suggest there may be a requirement to develop a capability to provide medical support to both the indigenous authorities and population. There is also a longer-term aspiration for the NHS to provide placements for Regular clinicians.
20. **DMS Summary.** The Commission fully supports Defence Medical Services' recommendations for developing military medical capability in support of Other Government Departments for UK Resilience, stabilisation and humanitarian relief. As the costs of providing some of these capabilities are significant, and extend across Government Departments, they will need to be subject to National Security Council scrutiny.

# Annex D to FR20 Final Report

## International Dimension

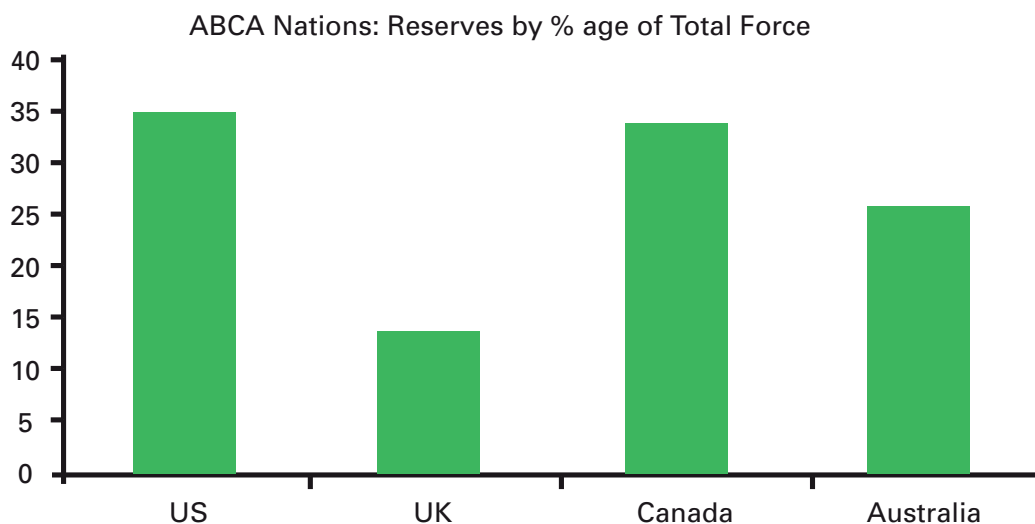
### Introduction

1. The high-level international analysis has enabled the Commission to test initial findings against comparator nations. Whilst principally focussed on ABCA nations<sup>17</sup>, some compelling initiatives have emerged from a broader study of countries such as Israel and Singapore. Whilst requiring some careful contextualisation, our allies present us with clear evidence of the relative imbalance of UK force structures; the relative dislocation of our Reserves from our society; and the imperative to attribute clear and relevant roles to Reserve Forces, including the requirement to provide resilience to communities and homeland defence. This Annex summarises some tactical and operational findings of the International Comparison, and explains how they contribute to a more strategic level narrative.

### Comparative Balance

2. There is a profound difference between the balance of Regular and Reserve components in the UK military, and that of our principal NATO allies:

The Reserve Forces of the ABCA countries are significantly better manned in proportion to their British equivalent and none are experiencing a similar crisis in junior TA officer numbers. The US Reserve Component (RC) retains nearly a million members and comprises about a third of the total US military force; it is thoroughly integrated across the spectrum of military missions. The US Reserve comprises seven component force elements<sup>18</sup>. The National Guard (NG) is a joint Reserve Component of the US Army and Air Force maintaining two subcomponents: the Army National Guard (ARNG 77%) and the Air



17. American, British, Canadian, Australian and New Zealand Armies' Program.

18. The National Guard (NG), The Army Reserve (AR), The Navy Reserve (NR), The Air Force Reserve (AFR), The Marine Corps Reserve (MR), The Coast Guard Reserve (CG) and The National Oceanic and Atmospheric Commissioned Corps (NOAA).

Force's Air National Guard (ANG 23%). 9% of the NG are employed on Active Duty TACOS (AGR<sup>19</sup> – 41,010 personnel). Established under Title 10 and Title 32 of the US Code, State National Guards are stationed in every State, Territory and District, and operate under their respective State Governor or Territorial Adjutant General (TAG). They are organised as an operational force capable of accomplishing state, national, and international missions during war and peace.

### Organisation

3. To meet these requirements, the ARNG maintains a balanced mix of Combat, Combat Support, and Combat Service Support units. These units are structured to integrate seamlessly with Active Component (AC) units as needed, and are located in nearly 3,000 communities throughout the United States enabling them to respond rapidly to domestic emergencies. At the strategic level, the National Guard Bureau (NGB) is responsible for the control and coordination of funds, end strength, force structure and equipment for the ARNG; funding, equipment and policy passes through the NGB, Division and Brigade structure. The National Guard is organised into 8 deployable Divisions each typically comprising 3 brigade Headquarters and 5-6 supporting units. This enables a Divisional National Guard deployment on every operational rotation in addition to specialist augmentation from the Army Reserve. The ratio of Reserves to Regular Forces in the Canadian Forces (CF) is equally high, equivalent to almost 27% of the Maritime force, 40% of the Land Force and 11% of the Air Force. Canadian Army Reserves are held in 10 ('mini') brigades, Australian Army Reserves in 6 brigades, all of which are commanded by Reservists.

### Operational Output

4. The US Reserve Component has supported operations on an unprecedented scale in the last 10 years. At the time of writing, some 91,522 Reservists are mobilised to support Operation Noble Eagle (US Homeland security), Operation Enduring Freedom (Afghanistan) and Operation New Dawn (Iraq) with cumulative deployments since September 2001 now having surpassed 800,000.
  - a. **Hybrid War.** In 2004 the Division Headquarters and divisional troops of the 42nd Infantry Division (New York National Guard's *Rainbow* Division) were mobilised for service in Iraq. They were the first National Guard division to be sent to an active combat area of operations under its own command since the Korean War. Taking control of the North Central Area of Operations which included the provinces of Salah Ah Din, Diyala, At Tamamim (Kirkuk) and As Sulymaniah, they also became the first National Guard contingent to be in charge of an area of operation in the Middle East. In a hybrid threat environment, soldiers engaged in close combat, raids, weapon seizures, as well as training Iraqi Army forces and undertaking reconstruction projects. To date, more than 320,000 ARNG soldiers have been deployed on Federal duty to Iraq and Afghanistan. As well as the deployment of individuals and small teams of specialists (medics, lawyers and engineers), there have been three Australian Reservist sub-unit deployments to Afghanistan; all from 1 Commando Regiment and all during the winter period when the frequency of insurgent activity is reduced. Canadian Reservists can provide up to 25% of the deployed force on rotation, including a large component of the deployed air wing. As formed Companies, Canadian Reservists have frequently been integrated within Regular battalions, usually retaining a Reservist sub-unit commander.
  - b. **Peace Support Operations.** Australian Reservists currently provide 2 or 3 platoons of the Multi-National Rifle Company which forms the core of the military contribution to the Combined Task Force (CTF) in the Solomon Islands. While the initial military

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19. Active Guard Reserve.

response was made by Regulars, since 2006 Reservists have comprised between 70% and 85% of the Australian contingent, with the Regular personnel concentrated in the CTF HQ. It is noteworthy however, that the CTF is commanded by a Reservist Lieutenant Colonel and the Rifle Company by a Major. By late 2011, the Reserve Component is expected to be about 95% of the strength. Each Reserve rotation is for 4 months with mobilisation totalling no more than 6 months. Australian analysis for this scale of operations (albeit a low threat and permissive environment and with an extensive civilian support component) is broadly positive, indeed the Reserves were widely considered to have performed to a very high standard in the Solomon Islands stability and security mission, and to be ideally suited for it due to the aggregation of their civilian skills and life experience. In October 2010, an Australian joint Regular/ Reserve Component was raised to constitute the Timor Leste Task Group 2, the primary foreign military security force in Timor Leste and commanded by a Reserve Colonel. In contrast to the Solomon Islands deployment, Reservists are in continuous full time service for 12 months, including three months pre-deployment training, eight month deployment and one month decompression and normalisation. While the environment is again permissive, the potential for the threat to increase and instability to return is higher than in the Solomon Islands.

- c. **Homeland Security and Domestic Resilience.** Australian Reservists also play a significant role in providing Military Aid to the Civil Authority (MACA). Sub-units have been generated and deployed for events of significant international profile such as the 2000 Sydney Olympics, 2006 Melbourne Commonwealth Games, 2007 Asia Pacific Economic Cooperation forum and the 2008 Papal Visit. Reservists are used for low-risk search tasks and for vehicle control, and now represent the default solution for this type of operation. At State level in the US, 10,000 personnel were deployed in support of the 2009 Presidential inauguration and nearly 6,000 were mobilised for State Active Duty to combat flooding in North Dakota. In support of the civil authority, the US National Guard is explicitly responsible for the management of consequence, and has no counter-terrorism mandate. They provide expertise and niche capability to assist state governors in preparing for and responding to chemical, biological, radiological or nuclear incidents as part of a state's emergency response structure. Civil Support Teams were established to deploy rapidly to assist incident commanders in determining the nature and extent of an attack or incident; provide expert technical advice on WMD response operations; and help identify and support the arrival of follow-on state and federal military response assets. They are joint units and consist of both Army National Guard and Air National Guard personnel, with some of these units commanded by Air National Guard lieutenant colonels.
5. **Equipment Capability.** The US field a far greater array of 'high end' capabilities in the Reserves, but budgetary restraint has always precluded fielding to full establishment (normally between 45-79%). There is no singular rationale on decisions to retain capabilities in the Reserve Component; rather, capability is either retained or deleted on a case-by-case basis. Whilst aviation such as the A Model Apache, Huey UH-1 and Cobra remain in service with the Army National Guard it is principally to preserve skills prior to the roll-out of bespoke unit platforms, such as the new Lakota scout helicopter, and is supported by a significant Federally funded, and full time technical support echelon. Distribution of capability is co-ordinated by the National Guard Bureau in conjunction with the Department of Defense, but the intervention of politicians is decisive in determining precisely where it is distributed; for instance the delivery of 56th Stryker Bde to the Pennsylvania Army National Guard was chiefly orchestrated by Representative John Murtha. To conduct its specified maritime defence responsibilities (including Coastal Operations, Naval Control of Shipping and Mine Countermeasures) the Canadian Naval

Reserve deploy 12 Kingston Class Maritime Coastal Defence Vessels. There are 24 Reserve Units spread across the country with major bases on both coasts, 14 units on the St Lawrence River and Great Lakes and 5 deep in the land-locked interior. The Canadian Air Force chose to fully integrate the Air Reserve and the Regular Air Force establishments following the USAF *Total Air Force* model. Most Air Force wings, squadrons and units are now comprised of both Regular and Reserve Force personnel. Members of the Air Reserve are employed, primarily on a part-time basis, alongside their Regular Force counterparts, across the spectrum of air force activities. The Air Reserve provides support to the Air Force in ongoing peacetime tasks as well as deployed operations. There are three Reserve-heavy flying units – one DASH-8 training unit and 2 tactical helicopter squadrons.

### Optimising Access to Talent

6. **Officer Recruiting.** Each of the Canadian Services is responsible for the recruitment of Reserve recruits including Officer and Non-Commissioned candidates. Processing of all recruits, both Regular Force (Reg F) and Reserve Force (Res F) is done by Canadian Forces Recruiting Centres located in major centres across Canada. There are essentially two officer production programmes in the CF. The first, Direct Entry Officers (DEO) for candidates qualified to university degree level prior to recruitment. The second program combines attaining a degree in conjunction with military training. For Reg F candidates this is Royal Military College (RMC) while the Res F equivalent is the Reserve Entry Scheme Officer (RESO). In Australia, there are two main channels used for the recruitment of Reserve officers. These are recruitment of civilians into the Army using recruiting processes, and in-service applications or transfers of Army members using personnel management processes.
7. **Alignment of Officer Training with University Terms.** The Canadian RESO program permits the officer candidate to attend any civilian university rather than RMC and is the Canadian Army's equivalent to UOTC and the US Reserve Officer Training Corps (although not based on any formal linkage between Canadian Forces and civilian institutions). The RESO candidate enrolls in a Reserve unit that is located in the same area as the college or university in which the candidate studies. The course is specifically designed to enable the flexibility to complete training around civilian employment commitments and leave allowances, whilst optimising training opportunities around common university breaks and the academic year. The course is normally completed within 18 months to 3 years, and like its Australian equivalent<sup>20</sup>, is designed to train Reserve officers to command platoon size groups on peace and security operations.
8. **More Novel Approaches to the Sourcing of Talent.** The international analysis has emphasised the extent to which UK Defence is not postured to optimise the recruitment and retention of human talent. International precedents such as the Israeli Talpiot Programme illuminate radical methods of appropriating specific technological skills into the Reserve Component. Although not a function of the Reserve Forces, the Talpiot Programme presents a radical and dynamic engagement model that brings specific skills into the Reserve component through a return of (national) service. The idea was conceived in the 1973 Yom Kippur War, which undermined Israel's confidence in its military and technical capability. It was argued that given Israel's scant manpower and limited natural resources, its military needed a technological edge. In 1979, the first class of 25 Talpions entered the Hebrew University as cadets. Each year, the program selects the most promising high-school graduates in science and submits them to a strict educational regime for 3 years. Instead of serving in active military units, Talpions are then charged with improving the armed services through technological innovation

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20. The Army Reserve General Service Officer First Appointment Course.

for 6 years. Recently the focus of a feature in The Economist (UK) entitled '*MBAs are for Wusses: Military Service Makes Israeli Techies Tougher*'<sup>21</sup> it is now becoming widely recognised that initiatives such as the Talpiot are being credited with creating the technological boom that now fuels the Israeli economy. Not only would such a model provide a dynamic linkage between the Armed Forces and society, it also reaffirms the assertion of Future Character of Conflict analysis, that people provide the UK with its *strategic edge*.

### Total Force Development

9. The US, Canada and Australia are restructuring their large Reserve Forces into a more integral Total Force concept. For the US, nearly ten years of continuous operations in Iraq and Afghanistan has generated a renewed sense of the viability of the Total Force concept. As conceded in the Army Posture Statement 2010, demand for the Army is exceeding the capacity of the Regular Army (Active Component) alone. The Reserve Component has been continually mobilised and employed in support of Army operations to such an extent that Reservists are more experienced than ever before and now constitute the sole surge capability short of full mobilisation.
10. **The Abrams Doctrine.** As of March 2006, the Army Reserve was still providing 96% of the Army's Civil Affairs units and two of the Army's three Psychological Operations groups – as well as 30 % of the Army's total combat support and 45% of its combat service support capabilities. This reflects the historical legacy of the so-called *Abrams Doctrine*. General Creighton Abrams, Chief of Staff of the US Army from 1972-74, allegedly placed certain essential military assets in the Army Reserve and Army National Guard in order to make it difficult for the United States to fight another Vietnam-scale military operation without mobilising the Reserves.<sup>22</sup> The Reimer Report<sup>23</sup> self-consciously echoes the Abrams Doctrine by (re)stating the requirement to mobilise Reservists for their civilian skills during an era of persistent conflict. Consistent with the Total Force approach, the US Army has implemented a supply based model of deployment to introduce the rigour and predictability necessary for sustained combat operations. Under the Army Force Generation ('ARFORGEN') system, the Army deploys certain force capability packages for specific periods ('Boots on Ground' or 'BOG') and then returns each unit during its period of 'dwell' for a reset period. The Reimer panel recognised that the full function of this model remains (at time of writing) an aspiration rather than a realisation; principally because the personnel management system remains configured around hierarchical stovepipes that severely restrict, and sometimes prevent soldiers from changing and moving from one component (TACOS) to another as their life goals change; problems that also persist in the UK. This process is defined as a 'continuum of service' and aims to contribute to a quality Army by adapting efficient horizontal integration processes between the components; enhancing Army readiness and fulfilling personal aspirations.
11. **The Continuum of Service / Multi Lane Highway.** The number (and percentage) of officers with at least two years of active duty before becoming a member of the Army National Guard stands at 21,725 (51.5%) and 21,378 (58.8%) within the Army Reserve. There is consensus within the US National Guard that the increased migration of Active Component personnel into the Reserves has significantly contributed to the qualitative performance of the Reserves on operations. Whilst not yet a full realisation, the 'continuum of service' glide-path between different TACOS (within the *Total Force*) is (as a minimum) now providing a range of alternate engagement options for service personnel

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21. See <http://www.economist.com/node/16892040> accessed 28 May 11.

22. See Weitz, R., *The Reserve Forces of Nations: a Comparative Analysis* (2007), page 12-13.

23. Reimer, D.J., Shultz, R.C. and Helmly, J.R. (2010) *The Independent Panel Review of Reserve Component Employment in an Era of Persistent Conflict*.



with changed personal circumstances. In the UK Defence model, the 'Continuum of Service' principle emerged as a recommendation from the 2009 Strategic Review of Reserves ('The Cottam Report'). But implementation of the 'Multi Lane Highway' is fairly elementary by comparison and not yet institutionalised.

12. **Employer Support.** Other nations have more successfully drawn Employers into their Total Force framework. Underpinning the Australian Army's relationship with Employers is its status as a Registered Training Organisation. Reserve Officer training is delivered using the Australian Quality Training Framework and provides graduates with a Certificate IV in Public Safety (Military Leadership). More broadly, most Australian employers are happy to have their staff join the Army Reserve given its focus on instilling the Army's values of courage, initiative and teamwork and the development of leadership potential. Moreover, the Employer Support Payment (ESP) Scheme provides financial assistance to eligible employers to help offset the costs of releasing employees. ESP is paid at a weekly rate (currently \$1243.10 per week) regardless of the employee's salary, and there are no restrictions on the way in which employers can use the money. Both the US and Singapore have developed graduated bonus schemes for employers of Reservist personnel. The Total Defence Award is issued to eligible firms in Singapore who employ five or more Reservists, but can also be awarded on the nomination an individual Reservist on their staff. Consideration is given to what that company does to promote physical fitness/activity; to facilitate availability for national service, and for general compliance with the Total Defence initiative. The equivalent in the US is the ESGR Statement of Support Program. This seeks to inform and educate employers about their rights and responsibilities towards employees who serve in the National Guard and Reserve, and to also recognise and reward those employers who go "over and above" the requirements of the law. The UK has no equivalent method of rewarding the commitment of employers, nor has it fully recognised the value of integrating employers within the Whole Force model.

### The Societal Context

13. **Economy.** The imperative to systematically base each national analysis in careful context is as relevant for ABCA models as for other nations within the wider study set. Notwithstanding discernible contrasts in national culture, dissimilarities in political economy are profound; the UK Comprehensive Spending Review in 2010 represented a further divergence from the US approach to curtailing public sector borrowing. With a Department of Defense budget of \$663bn in 2010, the Pentagon annually accounts for 5% of the >\$14 trillion US National Deficit. Expressed in comparative terms, per capita spending on defence in the US is more than double that of the UK, and to replicate the US 16.13% GDP expenditure on defence, the UK Government would need to cease interest payments on National Debt, or the Ministry of Defence subsume the budgets of Transport, Industry, Agriculture and Employment. This gives a sense of the very different national scales and priorities which affect how the US chooses to structure its force.
14. **The Value Proposition.** None of the nations studied have sought to justify the use of Reservists on the basis of cost-effectiveness alone. Effective output costing has remained elusive. Since announcement of a \$178bn reduction<sup>24</sup> in defence spending (staged over five years) amorphous terminology such as value and cost-effectiveness has emerged within US strategic discourse, where previously expressions of pure cost were currency. This increasingly rhetorical and interchangeable use of the terms cost and value hinders broader strategic objectivity and otherwise valid statements of logic are obfuscated.

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24. See <http://www.defensenews.com/story.php?i=5990365&c=BUD&s=TOP> accessed 28 May 11.

## The Historical Context

15. Conclusions cannot be drawn from analyses of this nature without an appreciation of the historical basis of the selected international models. With the exception of the UK, the other English-speaking nations have structured a proportion of their Reserve Force elements inter alia to retain territorial viability in a significantly larger geographic space, over which sovereign authority cannot be easily or affordably projected using Regular manpower alone. Furthermore, other national Reserve Components are now as likely to be mobilised for domestic consequence management as expeditionary operations. Significant examples of Canadian Ranger support to civil operations include the avalanche at Kangiqsualujjuaq in northern Québec and the drinking water crisis in Kashechewan, Northern Ontario. Australian Sub-units were mobilised in response to the 2009 Victorian Bushfires and the simultaneous 2011 Queensland and Victorian Floods, dispersed over thousands of miles. This Haldanian emphasis on the importance of territoriality and localism however, does not readily support a purely quantitative critique of the current size of UK Reserve Forces; indeed it rather provokes the observation that in terms of geographic density alone, UK Reserve Forces are proportionately larger than in any other ABCA nation. Therefore the more prescient case for territoriality and the Reserves' qualitative contribution to UK Resilience and Homeland Security must be developed, recognising that its geographic identity will be more relevant in 2020 than ever previously.

## Conclusion: Reserve Forces and the Strategic Narrative

16. The longstanding absence of an existential threat to the UK has resulted in a misalignment of the '*Clausewitzian Trinity*'<sup>25</sup>. It is evident from the analysis that a greater perceived existential threat to a nation raises tolerance for the use of Reserves, and reduces the salience of 'duty of care' risk avoidance. In the US, attacks on the World Trade Center in 2001 upheld the perception of an existential threat to the homeland and found resonance within the distinct 'militia nation culture' which still pervades. This mentality was no less evident following the death of Osama Bin Laden at the hand of US Special Forces. Quoted in the editorial of US publication *Defense News*, one US tax payer was quoted as saying:

*"I don't know how much we're paying for Defense; I know it's a lot, but it's worth it."*<sup>26</sup>

The perception of threat to a nation, no matter how intangible, changes the motives for serving in the military; indeed, recent studies of American youth identified heavily value-orientated, intrinsic motivations as reasons for young people to undertake military service.<sup>27</sup> This increasingly institutional nature of US society and its Reserve Forces since 9/11 has also induced a heightened appreciation of Reserve Force issues in the political sphere and ensured that Homeland Security is a well established 'vote winner'. This political interest is further enhanced in the US through a more coherent alignment of Reserves to territorial space (*territoriality*) and crucially a specified role for Reserves in National Resilience. Other nations also define a role for their Reserves within a wide-ranging national strategic narrative, and carefully align the importance of their Reserve Forces to the sovereign integrity of the Nation. In the absence of an existential threat, some nations have successfully synthesised this narrative as a means to galvanising a people in the event of strategic shock. Singapore for instance, has adapted the posture

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25. Understood as the State, the Armed Forces and Society.

26. *Defense News* 9 May 11. page 28.

27. Griffith, J. Being a Reserve Soldier: A Matter of Social Identity. In *Armed Forces and Society*. 36/1, October 2009, page.253.

of Switzerland and Sweden, and now implements a *Total Defence* model which is proving particularly effective at bringing cohesion to an ethnically and culturally diverse population. So diverse are the potential threats to the UK, and so diverse our society, the opportunities afforded by a more strategically conceived Reserve Force are innumerable, indeed their potential role within a coherent UK 'strategic narrative' is critical.

# Annex E to FR20 Final Report

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