

# The Transformation of the Army Reserve: the Origins, Evolution, and Impact of Future Reserves 2020 on Reserve Logistics

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## Abstract

In July 2013 the British Government unveiled its Future Reserves 2020 (FR20) policy, which aimed to radically change the role and function of the Army Reserve by making it both more capable and more deployable. One of the policy's central organising principles was its focus on outsourcing military logistics capability previously held in the regular army to reserve forces in order to save costs. Reserve logistics transformation was therefore deemed central to the success of FR20. This thesis examines the origins, evolution and impact of FR20 as an attempt to organisationally transform the British Army Reserve's logistics forces. In first detailing the historical, political and conceptual origins of FR20, it argues that reserve transformations rarely succeed in the manner envisaged; that the intensely political origins of FR20 have shaped the policy during each step of its development; and that the radical change in the delivery of military logistics since 2000 which underpins FR20's emphasis on logistics is best understood through a post-Fordist analytical framework. Examining the impact of FR20 at the reserve sub-unit level, it argues that many units will struggle to deliver the capability required of them, but in other areas, such as integration with the regulars and increased professional opportunities, FR20 is succeeding. Quantitative evidence is presented to support these arguments. It then details how reserve logistics cohesion is different from that of regular combat forces, and shows how such inherent micro-level organisational factors can influence transformation. Finally, the wider implications of FR20 as a transformative attempt are discussed. This thesis's central argument is that the political origins of FR20 within Parliament, and the Army Reserves' organisational nature, have undermined the policy's ability to deliver the key military capabilities it envisaged of reserves logistics units. However, in some important cultural/normative aspects, FR20 is slowly transforming the reserves. To date, FR20 has therefore been a 'partial transformation'. In making this argument, this study contributes to the literature on the British Army Reserves, and military logistics, cohesion and transformation.

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'I don't find it hard to change,  
But some people seem to,  
And some countries seem to,  
And some institutions seem to,  
But it is particularly important.'<sup>1</sup>

Donald Rumsfeld,  
US Secretary of Defense,  
comments to media, 22 September 2002.

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<sup>1</sup> Seely, H. (2003) *Pieces of Intelligence: The Existential Poetry of Donald H. Rumsfeld*, London: Simon and Schuster, 9.

# Chapter One

## Future Reserves 2020 and Transformation

On 3 July 2013 in the House of Commons, the then Defence Secretary Philip Hammond outlined perhaps the most radical transformation of the Territorial Army (TA) attempted since its inception 105 years before. Summarising the new *Future Reserves 2020: Valuable and Valued* (FR20) policy, Hammond announced that in order to arrest the decline of the reserves and better integrate them with the regular armed forces, the government was investing £1.8 billion over the next ten years in reserve equipment, training and re-numeration.<sup>2</sup> £1.2 billion of this investment would focused on the TA – by far the largest of Britain's four reserve forces – to increase both its size and military capability. The *quid pro quo* of this investment was that the reserves would increase their military capability, become much more closely integrated with the regulars, and deploy more often. As Hammond outlined: ‘The job that we are asking our reservists to do is changing, and the way in which we organise and train them will also have to change’<sup>3</sup>, while FR20 itself went on to state that ‘We will use our Reserve Forces to provide military capability as a matter of routine, mobilising them when appropriate’.<sup>4</sup> Decisively for this study, FR20 placed major emphasis on outsourcing military logistics capability previously held in the regular army to an expanded and more deployable reserve logistics component. Crucially, as explored in this work, FR20 outlined significant changes to the capabilities expected of reserve logistics sub-units, stating

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<sup>2</sup> Ministry of Defence (2013) *Future Reserves 2020: Valuable and Valued*, (White Paper) London: HMSO. Henceforth *Future Reserves 2020*.

<sup>3</sup> Hansard (2013) Statement to House of Commons on Reserve Forces, 3 July, available at <http://www.publications.parliament.uk/pa/cm201314/cmhansrd/cm130703/debtext/130703-0001.htm#1307036600004>, retrieved 10 September 2016; *Future Reserves 2020*, 12.

<sup>4</sup> *Future Reserves 2020*, 12.

'Greater reliance will be placed on the Reserves to provide routine capability... primarily in the areas of combat support (artillery and engineers), [and] combat service support (such as logistics, medical)'.<sup>5</sup> Such a transformation foresaw the centralisation of reserve units and their incorporation into the army's new tiered readiness structure, 'Army2020'. This new vision articulated a step-change in the prominence of the reserve army in British defence policy and a major transformation of a force that had traditionally been a part-time militia of citizen-soldiers. The challenge was great, but with Hammond stressing the investments to be made to the reserves in numerous areas, FR20 received wide cross-party support in the House that day. The attempt to transform Britain's reserve army from a strategic to an operational reserve had begun.

This thesis examines the origins, evolution and impact of FR20 as an attempt to organisationally transform the British Army Reserve's logistics forces. In doing so, I address three inter-related research questions:

1. What are the historical, organisational and conceptual origins of FR20?
2. What is the impact of FR20 on the reserve logistics forces it was designed to transform?
3. What does this experience of FR20 tell us about professionalism and cohesion in reserve logistics units and, more broadly, the transformation of the Army Reserve?

In doing so, my central argument is that the political origins of FR20 within Parliament, and the Army Reserves' organisational nature, have undermined the policy's ability to deliver the key military capabilities it envisaged of reserves logistics units. However, in some important cultural/normative aspects, FR20 is slowly transforming the reserves. Thus, my overall argument is that FR20 has been, and will be, a 'partial transformation'. It is struggling to deliver its central aim of increasing reserve logistics

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<sup>5</sup> Future Reserves 2020, 22.

capability in the timeline required, but conversely, it is gradually changing cultural elements of the Army Reserve. Some micro-level associative patterns, though, are likely to prove more resistant to change.

In making this argument I present three original contributions to the academic literature. Firstly and primarily, I provide detailed empirical evidence of the organisational origins and evolution of FR20. In doing so, I originally and significantly contribute to the literature on the British reserves in general, and on FR20 in particular. Secondly, in order to understand FR20's heavy focus on increasing reserve logistics capability and the policy's impact on logistics units, I detail how Western military logistics structures and practices have recently transformed in line with what have been termed 'post-Fordist' principles to conceptually challenge much of the military logistics literature. Building on these arguments, I then detail how the political and conceptual origins of FR20, and the organisational nature of Britain's reserve army, have limited this attempt to transform reserve logistics and increase sub-unit capability. Finally, contrasting the military cohesion and transformation literatures which have exclusively focused on regular combat forces, by examining the impact of FR20 in these sub-units, I contribute new evidence on the nature of cohesion in reserve non-combat forces, while highlighting how the distinct nature of reserve service has resulted in a partial transformation. In the conclusion I broaden out my arguments to discuss how this partial transformation has been reconciled with FR20's original aims, and what this transformative attempt tells us about British civil-military relations and modern British society in general.

## **Future Reserves 2020**

The support Hammond received unveiling FR20 in the Commons in July 2013 stood in stark contrast to its genesis, and indeed, its later evolution. Before the government had even unveiled the transformation it had had to reconcile intra-party political divisions,

overcome resistance from the army high command, then set up its own separate planning team due to lingering distrust, while all the time remaining sensitive to public opinion in the wake of the recent swinging cuts to the defence budget and the size of the army in particular. Indeed, in a nod to the impact these cuts had had on the army, Hammond remarked: ‘The Army... has had substantially to redesign its reserve component to ensure that regular and reserve capabilities seamlessly complement each other in an integrated structure designed for [its] future role.’<sup>6</sup> Hammond thus highlighted that the transformation of the reserves was closely related to, and was also being undertaken simultaneously with, what was arguably the most significant organisational transformation of the army since the abolition of conscription in 1960.

Driven by political, financial – and to a much lesser-extent – strategic imperatives, the National Security Strategy and Strategic Defence and Security Review (SDSR) of 2010 signalled the new Conservative-Liberal Democrat coalition government’s primary desire to prioritise the economic security of the United Kingdom in the wake of the 2008 global recession.<sup>7</sup> However, it also represented a political desire to avoid the long term interventions of the Afghanistan and Iraq wars. This had dominated the British public’s perception of the armed forces during the same period, left them questioning previous governments’ decision making, and exposed major tensions between senior military commanders and their political masters.<sup>8</sup> Nevertheless, the government’s desire to reduce defence spending forced significant changes on the army, including how it perceived its future operations and how it organisationally oriented itself toward fulfilling them. The resulting transformation, labelled *Army2020*,

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<sup>6</sup> Hansard, 3 July 2013.

<sup>7</sup> HM Government (2015) *National Security Strategy and Strategic Defence and Security Review 2015: A Secure and Prosperous United Kingdom*, Norwich: HMSO; Cornish, P. and Dorman, A. (2011) ‘Dr. Fox and the Philosopher’s Stone: the alchemy of national defence in the age of austerity’, *International Affairs*, 87 (2).

<sup>8</sup> Kellner, P. (2012) Public Perceptions of the Army’, RUSI Land Warfare Conference, available at <https://www.youtube.com/watch?v=eS6DgD5ZUSM>, retrieved 10 September 2016; Bailey, J., Iron, R. and Strachan, H. (eds) (2013) *British Generals in Blair’s Wars*, London: Routledge; Strachan, H. (2003) ‘The Civil-Military Gap in Britain’, *Journal of Strategic Studies*, 26.

adopted a contingency-based approach to operations and emphasised defence engagement as one of its core tasks.<sup>9</sup> However, the most profound element was the reduction in regular army manpower from 102,000 in 2010 to 82,000 by 2018.<sup>10</sup> This reduction in personnel resulted in a new structure and readiness model for the army, and in particular, a renewed emphasis on the integration of the TA (soon to be re-christened the Army Reserve) to support the readiness cycle. Thus, the reductions in regular personnel were to be offset by a larger and more deployable force of army reservists, whose trained strength was to be expanded from 20,000 to 30,000 personnel by 2018. Much of this expansion was focused on the logistics component, which was expected to now routinely provide the logistics capability stripped from the regulars. On paper at least – and certainly, as will be discussed, it was presented in this manner by the government – FR20 was therefore central to the success of Army2020. In the following months and years, this repositioning of the Army Reserve at the core of British defence policy would ensure strong political and media interest in its evolution, and heavy criticism of its failures. But what exactly does FR20 aim to achieve?

FR20 represents the most severe transformation of the army's reserve since the Haldane reforms of 1907-08 created the TA, linked it with the regular army's regimental system, and ensured that TA units would be raised locally.<sup>11</sup> Most decisively, the full integration of the new Army Reserve into the Army2020 force readiness structure represents a fundamental change to the once peripheral organisation's place in British defence policy. The traditional evolution of the TA, bureaucratic politics, and the 1996 Reserve Forces Act limited the deployability of the

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<sup>9</sup> Ministry of Defence (2013) *Transforming the British Army, An Update – July 2013*, London: MoD, 1.

<sup>10</sup> Ministry of Defence (2012) *Transforming the British Army, July 2012 – Modernising to face an unpredictable future*, London: MoD. This number has been achieved ahead of schedule, see *The Daily Telegraph* (29 July 2015) 'British Army already below smaller 82,000 target'.

<sup>11</sup> Territorial and Reserve Forces Act 1907. It actually created the Territorial Force, the Territorial Army and Militia Act 1921 changed the name from TF to TA.

TA and the roles it fulfilled, especially abroad.<sup>12</sup> The essence of FR20 envisages the Army Reserve as more highly trained, more deployable, and therefore more capable of operating with their regular counterparts. Crucially, it states: ‘As an integral part of the Armed Forces, reservists will be required for almost all military operations... [and] principally in the Army’s case and as the situation demands, as formed sub-units or units.’<sup>13</sup> As such FR20 aims to change the traditional perception of the TA as a part-time force for use only in time of great emergency; the Army Reserve will now deploy routinely and aims to potentially compel employers to release personnel through changed legislation.<sup>14</sup> Similarly, it outlined a change in the nature of how reservists are to be used on operations. Taken together, this transformation marked a step-change in the liability for the Army Reserve and represented a change in its role from a strategic to an operational reserve. FR20 also detailed the closure and centralisation of a number of local Army Reserve sites in order to increase efficiencies during peacetime. Thus, FR20 aimed to transform the structure, role and capabilities of the Army Reserve.

Due to its close relationship to the army’s operational capability this transformed reserve is designed to deliver, the emphasis on deploying Army Reserve sub-units is worthy of further discussion here. In the past, although some infantry and medical company groups have collectively deployed on operations, this has been the exception rather than the norm. The pattern of mobilisation of the TA, in both the infantry and its supporting services, has usually been one of ‘intelligent mobilisation’ of individuals who volunteer to serve on operations by backfilling regular units, rather than deploying fully-formed reserve units together.<sup>15</sup> Thus, by deploying formed units and sub-units, FR20 aims to significantly change the way in which the TA will be used on operations.

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<sup>12</sup> Ministry of Defence (2011) *Future Reserves 2020 – The Independent Commission to Review the United Kingdom’s Reserves*, London: HMSO, 14-18. Henceforth *The Independent Commission*.

<sup>13</sup> *Future Reserves 2020*, 17.

<sup>14</sup> *Future Reserves 2020*, 9.

<sup>15</sup> Dandeker, C. et al. (2011) ‘The UK’s Reserve Forces: Retrospect and Prospect’, *Armed Forces and Society*, 37(2).

This requirement to deploy formed sub-units presents new challenges for the Army Reserve in terms of delivering the capability and readiness expected of it under FR20. Indeed, given FR20's emphasis, the sub-unit may be a particularly useful level of analysis for investigating FR20 as it is at this level that the transformation has been focused.

### **The Logistics Component**

FR20's central focus on the reserve logistics component is critical to this study as it provides the rationale for examining reserve logistics sub-units. Army2020 drastically reduced the size of the regular army's logistics component to save costs. For example, the regular army's Royal Logistics Corps (RLC) lost two regiments, while the Royal Electrical and Mechanical Engineers (REME) lost one battalion as result of the policy.<sup>16</sup> However, as detailed above, FR20 outlined significant changes to the capabilities expected of reserve logistics sub-units, stating 'Greater reliance will be placed on the Reserves to provide routine capability... primarily in... combat service support (such as logistics...)'.<sup>17</sup> A central organising principle of FR20 is therefore the outsourcing of logistics capability previously held in regular forces to the reserves to save costs. This cannot be overstated: the main organisational focus of the FR20 transformation was on supporting services and logistics. Meanwhile, other reserve units have been formed to deliver bespoke logistic capabilities. A central tenet of this increasing reliance on the reserve component is that combat service support (CSS, or logistics) reserve organisations at the sub-unit (company) level will be held at a higher level of readiness and must be capable of operating with their regular counterparts. In short, reserve logistics sub-units are to deliver more of the capability previously provided by regular

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<sup>16</sup> BBC (5 July 2012) 'Army to lose 17 units amid job cuts'.

<sup>17</sup> Future Reserves 2020, 22.

units. Thus, FR20 also represents an attempt to transform the role, capability and deployability of logistics sub-units.

Indeed, initial communication with Major General Kevin Abraham, Director General Army Transformation and the officer responsible for implementing FR20, indicated that one of the greatest risks to successfully implementing FR20 lay with the logistics element, and within this group, the REME and RLC; the regular army will be more dependent on the ability of these elements to deploy quickly and perform effectively.<sup>18</sup> The REME provide the army with its mechanics, and are specialists in heavy vehicle and helicopter recovery, repair and maintenance. The RLC has a myriad of responsibilities, from the transportation of supplies by road, sea and air, to the provisioning of food, operating ports and delivering post, amongst many others. The ability of REME and RLC sub-units to meet the new readiness requirements is therefore central to FR20's aims and important to its success, which in turn underpins Army2020. By contrast, the reserve combat component was not deemed to present such a major organisational challenge to FR20 as the policy was not as focused on it.<sup>19</sup>

### **Thesis and Structure**

This attempt to transform the Army Reserve's logistics raises a number of interesting questions about how the policy originated and how these origins determined its implementation. In order to understand the context of FR20 and hence its likely impact, I utilise a number of different literatures and methods to understand the different aspects of the central question detailed above. To address these interrelated issues, this study is primarily situated in the literature on the 'post-Fordist' military, a term which scholars have used to describe modern military organisations. I also incorporate this literature with that on military logistics, professionalism and cohesion in certain chapters.

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<sup>18</sup> Interview Director General Army Transformation, Major General Kevin Abraham, Andover, 14 January 2014.

<sup>19</sup> Ibid.

Following the methods chapter, Chapter Three assesses the organisational and strategic factors that have influenced previous attempts at reserve reform. While these previous reforms are centrally important to understanding the historical context for the current transformation, they allow me to highlight that while reserve transformations are often driven by similar political, financial and strategic factors, the organisational solutions that FR20 has adopted are unique. Building on this evidence, Chapter Four asks how and why did FR20 come to be implemented? It argues that the origins of FR20 were intensely political and that these origins had a major impact on the development and implementation of the policy.

As discussed above, FR20 placed heavy emphasis on the outsourcing of logistics capabilities to the reserve. Understanding how logistics organisation and practice has transformed in the past 15 years is therefore central to understanding the rationale behind FR20. Indeed, the transformation of the reserves and in particular its logistics component cannot be understood without recognising the drastic changes in how logistics is now delivered. Chapter Five therefore utilises a post-Fordist analytic framework to originally conceptualise the processes through which this drastic change has occurred. Post-Fordist processes are centrally important to understanding FR20's design and aims, but also to understanding its impact on the reserve logistics units who must now provide much of the capability outsourced from the regulars. Crucially, the organisation of forces around post-Fordist principles also provides a historically novel solution to the recurrent organisational problems experienced in past periods of reserve reform. The chapter also makes an original conceptual contribution to the military logistics literature by using recent business logistics and the post-Fordist literature to detail the principles and processes around which modern Western military logistics structures and practices have been designed, and how these principles have ultimately

shaped wider force structures. Chapters three, four and five therefore answer the first research question.

Once this context has been examined, this study investigates the new reserve policy's impact in the area where it – by FR20's own definition – matters the most: in reserve logistics sub-units. To answer the second research question, the impact of FR20 on the military capability of, and perceptions of cohesion and readiness in, reserve logistics sub-units are addressed. Chapter Six examines in detail the ability of sub-units to meet the increased 'hard' operational capability requirements demanded by FR20's post-Fordist approach. It highlights the bottom-up organisational factors impeding the transformation whilst assessing areas of FR20's success to date, namely opportunity, training course availability and integration. However, crucially, and controversially, it shows how the political origins of FR20 have resulted in an overemphasis on, and the politicisation of, recruiting. Chapter Seven draws on the 'Standard Model' cohesion literature to present the first quantitative cohesion and readiness data collected from surveys of reserve logisticians. It also assesses reservists' perceptions of morale and confidence in FR20, and uses a smaller sample to longitudinally examine changes in these perceptions as FR20 progresses. Finally, it also compares this reservist data with indicative data from regular units to support my arguments about the differing nature of cohesion in these forces discussed in Chapter Eight.

Aside from capability and perceptions of cohesion and readiness, FR20 also marks a potentially decisive change in the relationship between the regular army and the reserves; between a full-time professional army and what has traditionally been a part-time force of last resort. In short, FR20 is attempting to professionalise the reserves. These attempts to professionalise citizen-soldiers, and especially those in logistics trades, provides a new evidential base to compare with the recent literature on the impact of professionalisation on the nature of military group cohesion in modern, post-

Fordist regular combat forces. In order to address the third research question, Chapter Eight therefore fuses this literature with that on normative military transformations to discuss the softer, cultural impacts of FR20 on the selected units, allowing arguments about the nature of cohesion in logistics and reserve forces in general to be made. Building on these arguments, in the concluding chapter I draw together the study's findings and place them within the context of the military transformation literature, before widening the scope to discuss what the experience of FR20 tells us about recent British civil-military relations, and the major changes in British society since the 1960s. Finally, I argue that although FR20 has been a 'partial transformation' due its political origins and organisational friction, some of its failings as a transformative attempt are due to its failure to understand how British society itself has transformed.

### **Reserve Literature**

Not only are the chapters above important in assessing FR20's effectiveness in transforming these sub-units, and hence the wider success of the plan, they also address gaps in the academic literature on reserve forces in general and on the British reserves in particular. Referring to the 'dearth of sustained academic studies of [reserve forces]', Eyal Ben Ari and Edna Lomsky-Feder recently noted that this is because military sociologists have concentrated on issues associated with conscripts, regulars or commanders.<sup>20</sup> Indeed, they argue that it is because reserve forces have traditionally been viewed by military professionals as 'marginal organisations' that they have received relatively little attention from academics.<sup>21</sup> However, with the increased deployment of reserves in the 9/11 decade – especially of United States (US) National Guard/Army Reserve in Iraq – and the impact of the 2008 global recession on defence spending, there has been a growth in academic focus on reserve forces recently.

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<sup>20</sup> Ben-Ari, E. and Lomksy-Feder, E. (2011) 'Epilogue: Theoretical and Comparative Notes on Reserve Forces', *Armed Forces and Society*, 37(2), 361.

<sup>21</sup> Ben-Ari and Lomksy-Feder, 'Epilogue:', 362.

Indicative of this increasing interest, in 2011 *Armed Forces and Society* published a special edition exclusively examining the subject. The works in this edition are broadly representative of the extent of the literature on reserve forces, and can be divided into three main categories: ethnographies and organisational studies of particular nations' reserve forces; identity work on reservists; and quantitative research on particular elements of reserve service, such as health issues, and recruitment and retention. For example, Arie Perliger has usefully outlined the somewhat unusual cultural and organisational characteristics of reserve service in Israel and the changing relationship between the citizen-soldier and the state as the Israeli military professionalises.<sup>22</sup> Similarly, Hugh Smith and Nick Jan's ethnography charted the development of, and recent issues in, the Australian Defence Force Reserves, with some interesting examples of their deployment at the sub-unit level, while Claude Weber discussed the complicated organisational structure and stagnation in the French reserves.<sup>23</sup> Meanwhile, situating his study of the US Army Reserve and National Guard in the identity literature, James Griffith offered a framework for analysing the changing nature of reserve identities as their mission has evolved since the end of the Second World War.<sup>24</sup> While a central theme running through Perliger's, Smith and Jan's, and Griffith's works is the impact that the professionalisation of regular armies has had on respective reserve forces, none of these studies conducted in-depth examinations of how periods of organisational change have shaped this professionalisation, nor their effects on cohesion or conceptualisations of professionalisation in the reserves. Instead they are more organisational summaries of the current state of play within their respective forces.

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<sup>22</sup> Perliger, A. (2011) 'The Changing Nature of the Israeli Reserve: Present Crises and Future Challenges', *Armed Forces and Society*, 37(2).

<sup>23</sup> Smith, H. and Jans, N. (2011) 'Use Them or Lose Them? Australia's Defence Force Reserves', *Armed Forces and Society*, 37(2); Weber, C. (2011) 'The French Military Reserve: Real or Abstract Force?' *Armed Forces and Society*, 37(2).

<sup>24</sup> Griffith, J. (2011) 'Contradictory and Complimentary Identities of US Army Reservists: A Historical Perspective', *Armed Forces and Society*, 37(2).

Reserve identities have also received much attention. Referring to the Israeli reserves, Lomsky-Feder, Gazit and Ben-Ari have interestingly argued that reserve identities represent those of transmigrants, continually ‘journeying between military and civilian spheres.<sup>25</sup> Griffith has examined how social identity and personal identity impact reserve soldiers’ perceived readiness for combat and commitment to part-time military service.<sup>26</sup> More recently, Bonnie Vest has built on these works to examine the negotiated identities of National Guard soldiers, concluding that deployments have the largest impact on whether reservists identify themselves as soldiers, rather than citizens or citizen-soldiers.<sup>27</sup> Meanwhile, Gabriel Ben Dor et al. have expanded on the identity literature to quantitatively examine how collective and individual factors influence Israeli reservists’ motivations to serve.<sup>28</sup> Griffith – following Charles Moskos – has also examined reservists’ motives for serving in the Army National Guard through the institutional-occupational model, finding that institutional motives are more positively correlated with positive values of recruitment, retention and readiness.<sup>29</sup> Other works by Griffith – currently the most prolific published academic on the US reserves – examine the changing role and unique identities of US reservists and their impact on mental health,<sup>30</sup> and investigate the correlates of suicide amongst Guard soldiers.<sup>31</sup> Indeed, to date the sociological literature on the reserves has been heavily weighted toward US and Israeli experiences, perhaps because these have been the most deployed reserve forces

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<sup>25</sup> Lomsky-Feder, E., Gazit, N. and Ben Ari, E. (2008) ‘Reserve Soldiers as Transmigrants: Moving between the Civilian and Military Worlds’, *Armed Forces and Society*, 34(4), 593.

<sup>26</sup> Griffith, J. (2009) ‘Being a Reserve Soldier: A Matter of Social Identity’, *Armed Forces and Society*, 36(1).

<sup>27</sup> Vest, B. (2013) ‘Citizen, Soldier, or Citizen-Soldier? Negotiating Identity in the US National Guard’, *Armed Forces and Society*, 39(4).

<sup>28</sup> Ben Dor, G. et al. (2008) ‘I versus We’ Collective and Individual Factors of Reserve Service Motivation during War and Peace’, *Armed Forces and Society*, 34(4).

<sup>29</sup> Griffith, J. (2008) ‘Institutional Motives for Serving in the US Army National Guard’, *Armed Forces and Society*, 34(2); Griffith, J. (2009) ‘After 9/11 What Kind of Reserve Soldier’, *Armed Forces and Society*, 35(2).

<sup>30</sup> Griffith, J. (2011) ‘Decades of transition for the US reserves: Changing demands on reserve identity and mental well-being’, *International Review of Psychiatry*, 23.

<sup>31</sup> Griffith, J. (2012) ‘Correlates of Suicide Among Army National Guard Soldiers’, *Military Psychology*, 24.

over the past 50 years.<sup>32</sup> Furthermore, while there have been some comparative studies of reserve forces in Western militaries – most notably those of Louis Zurcher and Gwyn Harries-Jenkins, and Wallace Earl Walker – the latest of these was published over 25 years ago and therefore lacks currency.<sup>33</sup> Again, with many of these studies' focus on identity or other specific issues, they do not provide a deep, sociologically-informed analysis of the forces in question. Decisively, they do not address the professional or cohesion literature, nor that on military transformations.

The same is true of sustained academic study of Britain's reserve forces, and of the TA in particular. In 1975 Hugh Cunningham, and later Ian Beckett in 1982, both traced the origins and evolution of the Volunteer movement that preceded the TA, while Peter Dennis' useful study of the TA between 1906-1940 was published in 1987.<sup>34</sup> More recently, K.W. Mitchinson has examined the Territorials' formative years, its role in the Great War, and on the home front.<sup>35</sup> More pertinent to this study, in 1990 Walker published the most recent and in-depth organisational analysis of the TA.<sup>36</sup> In this work, Walker noted that the part-time, voluntary nature of service in the TA meant that it was fundamentally distinct from the regulars, and he identified a number of organisational paradoxes. Perhaps most tellingly, this included the contradiction between a militarily-capable force generated by intensive training and the lack of time the organisation, due

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<sup>32</sup> For example Sarkesian, S. and Connor, R. (1999) *The US Military Profession in the 21<sup>st</sup> Century: War, Peace and Politics*, London: Frank Cass; Duncan, S. (1997) *Citizen Warriors: America's National Guard and Reserve Forces and the Politics of National Security*, California: Presidio Press; Horowitz, D. and Kimmerling, B. (1974) 'Some Social Implications of Military Service and the Reserves System in Israel', *Archives European de Sociologie*, 15; Sion, L. and Ben-Ari, E. (2005) 'Hungry, Weary and Horny: Joking and Jestling among Israel's Combat Reserves', *Israel Affairs*, 11(4).

<sup>33</sup> Walker, W. (1990) *Reserve Forces and The British Territorial Army*, London: Tri-Services; Walker, W. (1992) 'Comparing Army Reserve Force: A Tale of Multiple Ironies, Conflicting Realities, and More Certain Prospects,' *Armed Forces and Society*, 18(3); Zurcher, L. and Harries-Jenkins, G. (eds) (1978) *Supplementary Military Forces: Reserves, Militias Auxiliaries*, Beverley Hills: Sage.

<sup>34</sup> Cunningham, H. (1975) *The Volunteer Force: A Social and Political History, 1859-1908*, London: Croom Helm; Beckett, I. (1982) *Rifleman Form: A Study of the Rifleman Volunteer Movement, 1859-1908*, Aldershot: The Ogilby Trust.

<sup>35</sup> Mitchinson, K. (2008) *England's Last Hope: The Territorial Force 1908-14*, London: Palgrave; Mitchinson, K. (2005) *Defending Albion: Britain's Home Army 1908-1919*; London: Palgrave; Mitchinson, K. (2014) *The Territorial Force at War 1914-16*, London: Palgrave.

<sup>36</sup> Walker, *Reserve Forces and The British Territorial Army*.

to its part-time nature, had to achieve this.<sup>37</sup> Thus, as well as the many cultural and organisational differences between the TA and the regulars, Walker recorded high variations in culture and capability across TA sub-units and a 30 percent turnover in personnel per year.<sup>38</sup> This created another contradiction whereby the need to continually train new personnel resulted in major retention issues. As a result Walker argued that the force was predominantly a reactive force of last resort, never really ready for war, and would likely have been unable to fulfil its Cold-War mission of providing support to first-line NATO troops in Western Europe.<sup>39</sup> Perhaps most significantly, he noted that the voluntary and part-time nature was conducive to organisational stasis; as one TA officer remarked: ‘There is nothing in the TA you can affect immediately. It takes 5-10 years [to make changes].’<sup>40</sup>

However, written at the end of Cold War, Walker’s insightful study is now over 25 years out of date. Furthermore, while Walker’s analysis is interesting and comprehensive, it lacks a theoretical framework beyond brief reference to organisational theory literature.<sup>41</sup> Consequently, his analysis could be argued to lack conceptual depth and it does not attempt to inform a wider analysis of reserve forces in general; the series of organisational ‘paradoxes’ Walker outlines in the TA are therefore left to the reader to decide if these are unique to the TA.<sup>42</sup> In short, Walker’s study tells us how the TA was in 1990, without placing it within the broader sociological literature on professionalism, cohesion, and transformations. It is therefore more of a snapshot of the TA in time, rather than a theoretically-driven piece of analysis. And the major question remains: how has the TA changed since then? More recently, Beckett published a historical overview of the TA in 2008, charting the changing roles and

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<sup>37</sup> Walker, *Reserve Forces and The British Territorial Army*, 8.

<sup>38</sup> Ibid, 3, 65.

<sup>39</sup> Ibid, 3.

<sup>40</sup> Ibid, 65.

<sup>41</sup> Walker, *Reserve Forces and The British Territorial Army*, 10-11.

<sup>42</sup> Ibid, 73, 90, 95.

organisation of the Territorials over the first 100 years of their service. While illuminating, this is historical rather than sociological analysis and it does not include the most recent attempt to transform the Army Reserves.<sup>43</sup> In summary therefore, the existing literature on the TA is relatively out of date and does not address recent wider sociological debates about professionalism, cohesion and transformation in modern Western reserve forces, nor indeed, their logistics components.

Even the most recent research on the TA/Army Reserve does not specifically address these questions. Whilst Christopher Dandeker et al.'s 2011 article does outline the bureaucratic debates around the changing role of the British reserves in general, it does not focus on the Army Reserve in particular and, as it predates the FR20 transformation, it lacks detail as to its exact nature and the possible implications for the Army Reserve. There is also no emphasis placed on the importance of sub-unit cohesion. Indeed, half the article concerns itself with reserve experiences and health outcomes which have become of increasing interest to the Ministry of Defence (MoD) as the reserves are deployed more often and public perceptions of the impact of PTSD have also been heightened.<sup>44</sup> In a similar vein, King's Centre for Military Health Research has conducted numerous recent studies into the impact of operational service on British soldiers' health outcomes, many of which include data from reservists.<sup>45</sup> Organisational culture academics have also studied the traditional clash of cultures between the regulars and the Territorials, most recently at the MoD's behest. Charles Kirke's small-scale study examined the Regular Army's perception of closer integration of the TA in 2008, and found that significant issues and cultural differences need to be overcome before any such policy could be effective.<sup>46</sup> Vince Connelly's interesting

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<sup>43</sup> Beckett, I. (2008) *Territorials: A Century of Service*, Plymouth: DRA.

<sup>44</sup> Dandeker et al, 'The UK's Reserve Forces: Retrospect and Prospect'.

<sup>45</sup> See KCMHR website: <http://www.kcl.ac.uk/kcmhr/pubdb/> retrieved 22 August 2016.

<sup>46</sup> Kirke, C. (2008) 'Issues in integrating Territorial Army Soldiers into Regular British Units for Operations: A Regular View', *Defense and Security Analysis*, 24(2).

2013 study of perceptions amongst regular and reserve soldiers, also undertaken for the MoD, drew similar conclusions, outlining the many cultural and practical barriers to integration that are undermining efforts to impose the FR20 transformation on both components of the army.<sup>47</sup>

Reflecting greater academic interest in the British reserves since FR20 was unveiled, in 2014 the Economic and Social Research Council (ESRC) made grants to four universities in the United Kingdom (UK), including the University of Exeter, to examine different aspects of British reserve service. These examine four separate themes related to the reserves in general, and it is interesting to note that these themes follow those of the majority of the reserve literature. These projects are: ‘negotiating civilian and military lives’; ‘sustaining Future Reserves 2020 (which focuses on decisions to leave the reserve); ‘keeping enough in the reserve’ (which examines what FR20 will mean for the armed forces, reservists, and civilian employers); and the ‘role of army reservists’ which examines competing claims on reservists’ time. While Tim Edmunds et al. have recently published an interesting overview of FR20 and some of the issues identified to date, especially in terms of recruitment, I would contend this paper lacks a recognition of the intensely political origins of FR20 and does not attempt to assess it in terms of a transformation.<sup>48</sup> Decisively, none of the above studies are primarily concerned with the military aspects of FR20, and especially this project’s focus on capability, transformation, professionalism, and cohesion. Similarly, while the most recent research on the Army Reserve is being conducted within the context of FR20, these do not seek to assess FR20’s origins and evolution, nor are they focused on logistics capability. Changes at the sub-unit level have also not been addressed. Overall therefore, this study is well-sited to update the literature on the British reserves in

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<sup>47</sup> Connelly, V. (2013) *Cultural Differences between the Regular Army and TA as barriers to Integration*, Unpublished paper prepared for Director, Personnel, Ministry of Defence.

<sup>48</sup> Edmunds, T. et al. (2016) ‘Reserve forces and the transformation of British military organisation: soldiers, citizens and society,’ *Defence Studies*, 16(2).

general by contributing new data on FR20, whilst also using this evidence to contribute to wider debates on reserve professionalism, cohesion and transformation. These literatures are important as they allow different aspects of FR20 to be understood from different but complimentary perspectives.

### **Post-Fordism**

Given the relatively limited research on reserve forces, this study is situated within three distinct strands of the wider sociological literature on the armed forces. At the macro-level of analysis, post-Fordism provides a theoretical framework for both the transformation of military logistics in particular and of Western militaries in general. As I have highlighted above, this is critically important in understanding the organising principles behind FR20 and in particular the transformation of reserve logistics sub-units as a result of the policy. In utilising this literature in Chapter Three, I conceptually advance the literature on military logistics by detailing how logistics have been transformed in the past 15 years around post-Fordist principles. At the meso-level the post-Fordist literature fuses with that on military transformation and professionalism, which run throughout this work. At the micro-level these fuse with the literature on cohesion, informing chapters seven and eight especially. These distinct but related literatures provide useful tools for examining the transformation of the British Army Reserve.

Indeed, at the heart of this transformation lies the uneasy dichotomy between the professionalisation of most Western armies since the 1960s through the interrelated processes that scholars have usefully described as ‘post-Fordist’, and the increasing reliance on part-time citizen-soldiers who are now to be better integrated with their full-time professional counterparts. Initially following the post-modernist trend, numerous scholars have examined how societal changes and increasing post-Cold War strategic uncertainty has resulted in changes to the missions and structures of the modern

military.<sup>49</sup> For James Burk and Charles Moskos, recent societal evolutions have resulted in changing conceptions of the rights and duties of citizens with regards to military service, whilst simultaneously underpinning an organisational shift from conscript forces designed to partake in mass state-on-state conflicts towards a ‘smaller, voluntary professional force that relies on reserve force to accomplish its missions.’<sup>50</sup>

However, the post-modern critique fails to address economic and industrial change, and while the debate over the extent to which modern militaries are truly post-modern continues,<sup>51</sup> Anthony King has developed the term of post-Fordism to describe the ongoing changes in the Western militaries.<sup>52</sup> King draws on industrial sociology to examine how the end of the Fordist mode of production, relying on mass labour forces ‘employed on long term contracts, producing standardised products for stable markets’ began to be undermined in the 1970s by rising production costs and competition.<sup>53</sup> In response to these dual pressures, companies in Japan and America in particular began to organisationally transform. Four central changes were identified in this transformation: the replacement of mass labour with a highly skilled core and less-skilled periphery; the outsourcing of non-core functions and the adoption of ‘just in-time’ (JIT) logistics to reduce overheads; the centralisation of headquarters and the flattening of industrial hierarchies; and the development of a network approach to supply and knowledge.<sup>54</sup>

For King, the professionalisation of Western militaries, their continued reduction in size, and the concentration of military power in the special forces, are indicative of

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<sup>49</sup> Baudrillard, J. (1994) *Simulacra and Simulation*, Michigan: University of Michigan Press; Lyotard, J-F. (1979) *The Postmodern Condition: A Report on Knowledge*, Manchester: Manchester University Press.

<sup>50</sup> Moskos, C. and Burk, J. (1994) ‘The Post-Modern Military’ in Burk, J. (ed), *The Military in New Times*, Berkeley: Westview Press, 171.

<sup>51</sup> Dandeker, C. Booth, B. Kestnbaum, M. and Segal, D. (2001) ‘Are Post-Cold War Militaries Postmodern? *Armed Forces and Society* 27(3); King, A. (2005) ‘Towards a Transnational Europe: the case of the armed forces’, *European Journal of Social Theory*, 8(4); Bondy, W. (2001) ‘Postmodernism and the Source of Military Strength in the Anglo-West’, *Armed Forces and Society*, 31(1).

<sup>52</sup> Dandeker, et al. (2001). ‘Are Post-Cold War Militaries Postmodern?; Kaldor, M., Albrecht, U. and Schméder, G. (eds), (1998) *The End of Military Fordism*, London: Pinter, 2.

<sup>53</sup> King, A. (2006a) ‘The Post-Fordist Military’, *Journal of Political and Military Sociology*, 34(2), 360.

<sup>54</sup> King, ‘The Post-Fordist Military’, 360-361.

the development of a highly specialised core, whilst the increasing emphasis on surging reserve manpower in times of need highlights the periphery.<sup>55</sup> The US military's outsourcing of specialist logistical and technical services is briefly discussed while King also acknowledges the adoption of JIT logistics practices to reduce overheads. Centralisation is evident in the development of joint and transnational military headquarters which share professional knowledge whilst paradoxically encouraging subordinates to act on their own initiative by decentralising command decisions, thereby flattening hierarchies. Similarly, the development of a non-linear operational approach to the dispersal and co-coordination of forces centred around independent brigades indicates the military's adoption of a network approach to warfare.<sup>56</sup> Using this evidence, King argues that modern Western militaries have transformed in a fashion analogous with post-Fordist industry, primarily due to similar 'supply and demand-side pressures.'<sup>57</sup> He draws on the wider literature on institutional transformation to posit that, faced with these pressures, Western militaries have emulated industry in a process similar to the 'institutional mimetic isomorphism' first coined by Paul Dimaggio and Walter Powell.<sup>58</sup>

King's contribution is an accurate description of the changes occurring within Western militaries and is perceptive as to why these are happening. In identifying dominant modes of production, and economics, as important sources of military transformation, his approach explicitly links military change with industrial and economic change. However, in determining post-Fordism's four central changes, King's main focus remains on land combat forces. While he notes the role of logistics in wider military transformation, in particular in relation to outsourcing, the exact nature and

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<sup>55</sup> Ibid, 361-364.

<sup>56</sup> King, 'The Post-Fordist Military', 367.

<sup>57</sup> King, 'The Post-Fordist Military', 368.

<sup>58</sup> Dimaggio, P. and Powell, W. (1983) 'The Iron Cage Revisited: Institutional isomorphism and collective rationality in organisational fields,' *American Sociological Review*, 48.

impact of these logistical changes is not fully developed. The question remains if logistics in modern militaries – presumably under similar, if not more intense, economic pressures than the combat function – has transformed in a similar post-Fordist fashion.

Crucially in terms of this study, in the post-Fordist mode of production the distinction is made between the ‘specialist core... and a subsidiary workforce on temporary and short-term contracts.’<sup>59</sup> Clearly, these core/periphery observations have immediate relevance for the current transformation of the British Army, with Army2020 reorganising the force into a Reaction/Adaptable Force structure, and its renewed emphasis on the reserves. Moreover, in keeping with the reasons for these changes, and countering the fluidity associated with post-modernism, King argues that militaries are ‘changing in structure to fulfil new missions in the face of economic and strategic pressures.’<sup>60</sup> Similarly, the outsourcing of defence tasks to the reserves and the tiered readiness outlined in Army2020 are indicative of the post-Fordist trend toward JIT delivery of services and supplies to increase efficiency. As such, in examining the current changes to the structure and role of the reserves, and in particular their logistics component, the post-Fordist literature provides a rich theoretical framework to understand why and how Britain is attempting to transform the Army Reserves’ effectiveness, especially in terms of logistics.

### **Professionalism**

Related to the post-Fordist literature is that on the professional military. There is wide consensus that the pace of Western military professionalisation vastly increased in the second half of the 20<sup>th</sup> Century with the end of conscription, the reduction in armies’ size and the increasing technological sophistication of warfare.<sup>61</sup> Samuel Huntington’s

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<sup>59</sup> King, ‘The Post-Fordist Military’, 360.

<sup>60</sup> King, ‘The Post-Fordist Military’, 362.

<sup>61</sup> Huntington, S. (1957) *The Soldier and the State*, Harvard: Harvard University Press; Janowitz, M. (1971) *The Professional Soldier*, New York: Free Press; King, A. (2013) *The Combat Soldier*, Oxford:

*The Soldier and the State* is both dated and problematic, but it was the first to identify the changes that increasing professionalism were having on the US Army in the 1950s.<sup>62</sup> Huntington argued that the US professional officer corps was a ‘functional group with highly specialised functions’ akin to other professions; he thus defined professionalism as a product of expertise, responsibility and corporateness.<sup>63</sup> He therefore noted how officers in particular were now increasingly educated and trained to acquire skills and knowledge to conduct highly specialised tasks.<sup>64</sup> Echoing Huntington, in *The Professional Soldier* Morris Janowitz also saw ‘skills acquired through intensive training’ as the hallmark of the professional army, seeing professional-era officers as similar to other professions such as lawyers and doctors.<sup>65</sup> Interestingly, Huntington specifically argued that the reservist was a caste apart from the new professional military class, claiming that as reservists ‘seldom achieve the level of professional skill open to career officers’, consequently the reservist ‘only temporarily assumes professional responsibility.’<sup>66</sup> Indeed, he went further, positing that the reservist’s ‘principal function in society lies elsewhere’;<sup>67</sup> an argument that undermines the common perception of reservists’ role in building civil-military ties. As a result of this functional difference, Huntington argued that reservists’ ‘motivations, values and behaviour frequently differ greatly from those of career professionals.’<sup>68</sup>

It is clear that, for Huntington, the origins of the professional military are to be found in expertise, in time spent training, and that because reservists by their very

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Oxford University Press; Moskos, C. Williams, J. and Segal, D. (eds) (2000) *The Postmodern Military: Armed Forces after the Cold War*, Oxford: Oxford University Press.

<sup>62</sup> For instance, Huntington’s focus on the officer corps as the sole custodians of professional practice does not match the realities of the expertise held by professional soldiers today, while his views that most civil-military relations occur between officer and the state/public appear even more outdated given recent advances in information technology and social media.

<sup>63</sup> Huntington, *The Soldier and the State*, 7, 10.

<sup>64</sup> Huntington, *The Soldier and the State*, 8-9.

<sup>65</sup> Janowitz, *The Professional Soldier*, 6.

<sup>66</sup> Huntington, *The Soldier and the State*, 17.

<sup>67</sup> Ibid.

<sup>68</sup> Huntington, *The Soldier and the State*, 17.

nature do not have the same amount of time as regulars, they are therefore unprofessional. Similarly, Janowitz states bluntly: ‘A man is either in the armed forces or not’,<sup>69</sup> thereby missing the complex roles and identities of reservists. The views of Huntington and Janowitz are also consistent with Connelly’s recent findings on the regular army’s attitudes toward integrating the TA.<sup>70</sup> This definition of professionalism based on status groups with specialised expertise, and, crucially, the amount of time spent undertaking professional activity, is fundamentally at odds with the very concept of reserve service. Indeed, numerous academics have argued that professionalisation – with its shift to a volunteer force encouraging occupational rather than institutional motivations to serve – has caused the demise of the mass-era citizen-soldier, who were defined by their representativeness of society, their notion of service to the nation, and their primary identity as citizens who are only temporarily in uniform.<sup>71</sup> While these arguments on the death of the citizen-soldier have been challenged,<sup>72</sup> it is clear that within the current attempt to transform the British Army Reserves, there exists an interesting paradox; on the one hand, professional soldiering is still largely defined by full-time service and experience, yet FR20 is seeking to increase the performance of part-time reservists who remain – by the military’s own definition – unprofessional citizen-soldiers. As such, this literature provides a rich context to collect data on the juxtaposition between professionalism and the citizen-soldier.

One critique of King’s work on the post-Fordist military is that it lacks the wider social and cultural aspects of the post-modernist scholars.<sup>73</sup> More recently, King has convincingly argued that professionalisation ‘does not simply involve a change of

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<sup>69</sup> Janowitz, *The Professional Soldier*, xvi.

<sup>70</sup> Connelly, *Cultural Differences*, 11.

<sup>71</sup> Cohen, E. (2001) ‘Twilight of the Citizen-Soldier’, *Parameters*, Summer; Moskos, C. (1977) ‘From Institution to Occupation: Trends in Military Organization,’ *Armed Forces & Society*, 4 (November); Burk, J. (2007) ‘The Changing Moral Contract for Military Service,’ in Bacevich, A. (ed) *The Long War: America’s Quest for Security since World War II*, New York: Columbia University Press.

<sup>72</sup> Krebs, R. (2009) ‘The Citizen-Soldier Tradition in the United States: Has its Demise Been Greatly Exaggerated?’ *Armed Forces and Society*, 36(1).

<sup>73</sup> Levy, Y. (2010) ‘The Essence of the “Market Army”,’ *Public Administration Review*, 70(3), 379.

employment contract between the soldier and the armed forces. It represents a profound transformation of the associative patterns within the armed forces and the solidarities displayed within military units.<sup>74</sup> He has examined how, at the micro-interaction level, the continued applicability of this skills-based definition of professionalism is evidenced in the successful execution of battle drills and other formalised practices, both individually and collectively.<sup>75</sup> Following Huntington, King argues that competent performance, and the status this generates, defines professionalism in modern militaries. By taking a similar approach to the ongoing attempt to increase the effective performance of the Army Reserve at the sub-unit level, in this thesis I investigate the interesting commonalities and contradictions between reserve logistics sub-units and the regular combat forces about which King writes. In relating the literature on the professional military to the British Army Reserve, this research adds an additional strand to it. Similarly, by focusing on the logistics sub-unit, this study not only addresses one of the most important areas of FR20, it also complements King's work on the impact of professionalisation in regular combat units.

### **Military Transformations**

That FR20 is an attempt to transform the reserves is clear. The FR20 policy document itself stated that 'FR20 is part of the wider Transforming Defence campaign that is aiming to transform our Armed Forces and deliver Future Force 2020.'<sup>76</sup> It also specifically mentioned reserve transformation a further three times, placed it within the context of the Army2020 transformation, and made the 2-star Director General Army Transformation responsible for implementing the policy.<sup>77</sup> That the army and the wider defence establishment viewed Army2020 and FR20 as a transformative process is also

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<sup>74</sup> King, *The Combat Soldier*, 208-9.

<sup>75</sup> Ibid, 222-265.

<sup>76</sup> *Future Reserves 2020*, 59.

<sup>77</sup> *Future Reserves 2020*, 59.

clearly supported by other official documents.<sup>78</sup> Conversely, reform is not mentioned once in relation to the reserves in FR20, and once in another document, but only in relation to reserve recruitment systems.<sup>79</sup>

The recent appearance of transformation in the lexicon of military policy and academia in part reflects the RMA, and Western armies' difficulties re-organising themselves for expeditionary counter-insurgency operations post-2003. Indeed, the major tactical, operational and strategic changes introduced as a result of the adoption of COIN principles in Iraq from 2006 led the US Army to embark on a 'transformation' of its structure into modular brigades, and in 2009 the British Army initiated a 'transformation in contact' policy to implement similar organisational changes.<sup>80</sup> Nevertheless, as 'reform' has been used more predominantly in the literature describing past periods of organisational change in the reserves, it is important to make the distinction here between reform and transformation. The *Oxford English Dictionary* defines reform as: 'make or become better by removal or abandonment of imperfections.'<sup>81</sup> Interestingly however, transformation does not have the same focus on improvement: 'change from one figure or expression or function to another of same magnitude, value etc.'<sup>82</sup> Somewhat pedantically, other definitions imply that transformation involves greater change than reform.<sup>83</sup> Transformation therefore is a rhetorically more positive term – it implies change without implying weakness – a potentially useful distinction for senior military officers when advocating the need for organisational change. It has also become an increasingly fashionable term. Despite these issues, this study uses the term transformation to examine FR20, rather than

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<sup>78</sup> *Transforming the British Army; Transforming the British Army: An Update.*

<sup>79</sup> *Future Reserves 2020; Transforming the British Army; Transforming the British Army: An Update.*

<sup>80</sup> Foley, R., Griffin, S. and McCartney, H. (2011) "Transformation in Contact": learning the lessons of modern war', *International Affairs*, 87(2), 253.

<sup>81</sup> *Oxford English Dictionary* (1983) Oxford: Oxford University Press, 872.

<sup>82</sup> *Ibid*, 1138.

<sup>83</sup> *Oxford English Dictionary* (2008) Oxford: Oxford University Press, 1101.

reform, as it reflects the terminology used in official documents. Reflecting the more widely used term for past attempts to change the reserves, reform is used when discussing historical cases.

Recently a significant body of literature has emerged that considers the sources of transformation within military organisations. Theo Farrell and Terry Terriff have defined military transformation as a major ‘change in the goals, actual strategies, and/or structures of a military organisation.’<sup>84</sup> Crucially, they argued that ‘it is the outcome of military change that determines whether it is major or minor in character.’<sup>85</sup> Broadly speaking, two main schools of thought have developed on how militaries change. The top-down approach of Barry Posen, Steven Rosen and Deborah Avant, has focused on the importance of doctrine, civil-military relations and inter- and intra-service politics as drivers of military transformation.<sup>86</sup> This top-down transformation – what Farrell later labelled ‘innovation’ – represents most of the previous attempts initiated by political or military elites to reform British reserve forces in the past.<sup>87</sup> As Chapter Three highlights, major reserve reform has traditionally been a top-down process. However, more recently Adam Grissom, Elliot Cohen, and James Russell, amongst others, have argued that militaries can also transform in response to bottom-up – or tactical – pressures.<sup>88</sup> Grissom has argued that bottom-up tactical changes can be simultaneously involved in transformation,<sup>89</sup> and Farrell later conceptualised these processes as top-down innovation – a ‘major change that is institutionalised in new doctrine, a new organisational structure and/or new technology’ – and bottom-up ‘adaption’ which

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<sup>84</sup> Farrell, T. and Terriff, T. (eds) (2001) *The Sources of Military Change: Culture, Politics Technology*, Boulder: Lynne Reinner, 6; Farrell, T. (2010) ‘Improving in War: Military Adaptation and the British in Helmand Province, Afghanistan, 2006–2009, *Journal of Strategic Studies*, 33(4), 570.

<sup>85</sup> Farrell and Terriff, *The Sources of Military Change*, 5-6.

<sup>86</sup> Posen, B. (1984) *The Sources of Military Doctrine*, New York: Cornell University Press; Avant, D. (1994) *Political Institutions and Military Change*, Ithaca, New York: Cornell UP; Rosen, S. (1991) *Winning the Next War: Innovation and the Modern Military*, New York: Cornell University Press.

<sup>87</sup> Farrell and Terriff, *The Sources of Military Change*, 6; Farrell, T. ‘Improving in War’, 570.

<sup>88</sup> Grissom, A. (2006) ‘The Future of Military Innovation Studies’, *Journal of Strategic Studies*, 29(5), 910.

<sup>89</sup> Russell, J. (2010) ‘Innovation in War: Counterinsurgency Operations in Anbar and Ninewa Provinces, Iraq, 2005 -2007’, *Journal of Strategic Studies*, 33(4);

represents a ‘change to tactics, techniques or existing technologies to improve operational performance’.<sup>90</sup> Rob Foley, Stuart Griffin and Helen McCartney have shown how top-down and bottom-up changes are largely dependent on each other if transformation is to be lasting.<sup>91</sup> Meanwhile, Sergio Catignani and Rafael Marcus have examined how forces’ ability to incorporate lessons learned affects their ability to transform.<sup>92</sup>

Clearly then, there are different approaches to understanding military transformations, and scholars have recently begun to acknowledge the complexity of transformative processes. Very recently, Stuart Griffin has excellently critiqued the transformation literature. While lauding the discipline for its open, multidisciplinary approach, he argues that it has predominantly followed the cultural turn. Decisively, he also argues that it frequently lacks the sustained application of wider organisational and sociological theory.<sup>93</sup> While Griffin cites the organisational learning literature,<sup>94</sup> this observation also applies to the organisational change management literature. For example, Foley et al.’s arguments, (and indeed others) about the inter-relatedness of transformative processes fails to realise that change management scholars David Nadler and Michael Tushman had identified almost exactly the same processes in their Change Management Congruence Model some 15 years earlier.<sup>95</sup> This thesis seeks to address this lack of broader theoretical inquiry in transformation studies by incorporating not

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<sup>90</sup> Farrell and Terriff, *The Sources of Military Change*, 6; Farrell, T. ‘Improving in War’, 570.

<sup>91</sup> Foley et al. ‘Transformation in Contact’.

<sup>92</sup> Catignani, S. (2012) ‘Getting COIN at the Tactical Level in Afghanistan: Re-Assessing Counter-Insurgency Adaption in the British Army’, *Journal of Strategic Studies*, 35(4); Catignani, S. (2014) ‘Coping with Knowledge: Organisational Learning in the British Army?’, *Journal of Strategic Studies*, 37(1); Marcus, R. (2015) ‘Military Innovation and Tactical Adaptation in the Israel-Hizballah Conflict: The Institutionalization of Lesson-Learning in the IDF’, *Journal of Strategic Studies*, 38(4).

<sup>93</sup> Griffin, S. (2016) ‘Military Innovation Studies: Multidisciplinary or Lacking Discipline?’, *Journal of Strategic Studies*, 15-16, available at

<http://www.tandfonline.com/doi/full/10.1080/01402390.2016.1196358> retrieved 11 September 2016.

<sup>94</sup> Argyris, A. and Schön, D. (1995) *Organizational Learning II: Theory, Method, and Practice*, Reading, MA: Addison-Wesley; Dibella, A. Nevis, E. and Gould, J. (1996) ‘Understanding Organizational Learning Capability’, *Journal of Management Studies* 33(3); Levitt, B. and March, J. (2007) ‘Organizational Learning’, *Annual Review of Sociology*, 14.

<sup>95</sup> Nadler, D. and Tushman, M. (1997) *Competing By Design*, New York: Oxford University Press.

only the post-Fordist conceptual framework for explaining organisational change, but also the sociological literature on professionalism and cohesion to give greater theoretical depth to my evidence on the nature of the Army Reserve and my arguments on FR20 as an attempt to transform it.

While different aspects of the transformation literature run through this study, I primarily draw on two major contributions. The first is the top-down innovation literature detailed above, which is particularly pertinent as it provides the closest conceptual link between the transformation literature and previous works on the British reserves. The second concerns normative transformative patterns. Elizabeth Kier has challenged the top-down approach's realist-functional focus, arguing that organisational culture, rather than institutional politics and power, explains the choice of offensive and defensive doctrinal postures. For Kier, doctrine 'is best understood from a cultural perspective'.<sup>96</sup> She supports her arguments with evidence from the inter-war years of the British military's refusal to professionalise due to concerns about control of the military inherently bound in British history and culture, and with evidence showing that competing ideologies on the political Left and Right in France about the military's role in society at the time curtailed its ability to increase its effectiveness, resulting in a defensive doctrinal posture. Kier drew heavily on Ann Swidler's definitions of culture and ideology, which is worthy of repetition here. For Swidler, culture is defined as 'the set of assumptions so unself-conscious as to seem a natural, transparent, undeniable part of the structure of the world', while ideology is the 'highly articulated, self-conscious belief in [a] ritual system aspiring to offer a unified answer to the problems of social action'.<sup>97</sup> Thus, culture can be perceived of as an inherent cause of action, ideology an explicit call for a certain kind of action. However, whilst adding a rich cultural

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<sup>96</sup> Kier, E. (1997) *Imagining War: French and British Military Doctrine*, Princeton: Princeton University Press, 21.

<sup>97</sup> Swidler, A. (1986) 'Culture in Action: Symbols and Strategies', *American Sociological Review* 51, 279, 284.

perspective, Kier's analysis is also top-down, doctrinal-based, and focused solely on regular combat forces. Building on Kier's work, Farrell also used a constructivist approach to highlight the importance of cultural norms within military organisations in relation to change.<sup>98</sup> Farrell and Kier were right to identify the importance of culture in influencing transformations. However, Farrell's analysis is predominantly concerned with militaries' tendency to emulate others' organisational structure and doctrine, and although Kier discusses professionalism in the context of the British military, she does not examine in detail the impact that professional culture can have on a force.

Interestingly, but unsurprisingly, all these approaches to military transformation have focused exclusively on the combat arms and how the way they conduct operations over time has changed. Similarly, King's work on the transformation of Europe's armed forces identified very important changes in the operational planning, structures and networks of combat forces exclusively.<sup>99</sup> King's later study of the impact of professionalisation on the modern Western soldier also focused exclusively on combat troops.<sup>100</sup> Indeed, none of the recent literature on military transformation has examined military logistics, nor reserve components. Crucially, it remains to be seen if and how differences in the organisational culture and bureaucratic politics of the reserves influences transformation compared to the regular forces. More specifically, how is the culture of professionalism influencing the FR20 transformation of reserve logistics units? It can also be argued that the majority of the transformation literature is positivist: almost exclusively, only major transformations that have been successful have been studied. While Rosen, Avant and Kier, have considered how organisational stasis and the inability to adopt the appropriate offensive or defensive military postures leave states ill-prepared for war, they do not consider transformations that have not, or

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<sup>98</sup> Farrell, T. (2001) 'Transnational Norms and Military Development: Constructing Ireland's Professional Army', *European Journal of International Relations*, 7(1).

<sup>99</sup> King, A. (2011) *The Transformation of Europe's Armed Forces*, Cambridge: Cambridge University Press.

<sup>100</sup> King, *The Combat Soldier*.

have only partially, succeeded in and of themselves. Warning against this over emphasis in the literature, Griffin has called for ‘revisiting some of the case studies of failure to innovate’.<sup>101</sup> Indeed, I am only aware of three works examining the failure to transform. Catignani has argued that the British Army struggled to adopt counterinsurgency (COIN) practices at the tactical level in Afghanistan despite them being incorporated into higher command doctrine.<sup>102</sup> Similarly, Grissom has discussed how the organisational nature and tribal politics in Afghan National Army limited NATO attempts to transform it, while Kristen Harkness and Michael Hunzeker’s have shown how the failure of the British Army to conduct a COIN campaign in Southern Cameroon in the early 1960s was caused by a lack of political appetite, despite tactical adaption actually occurring.<sup>103</sup> Nevertheless, all of these works are focused on war time transformation and do not address the issue of top-down, politically-imposed transformations in peacetime, nor consider wider sociological debates about the changed nature of modern society. Overall, therefore, this leaves open the important question of why do peacetime attempts to transform reserve forces flounder?

## Cohesion

While the question of why soldiers continue to fight when faced with the horrors of combat has fascinated society since at least the time of Herodotus,<sup>104</sup> it was only in the latter 20th Century that social scientists turned their attention to the topic of military group cohesion. Broadly defined, group cohesion has been traditionally defined as the ‘extent to which members come together to form the group and hold together under

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<sup>101</sup> Griffin, ‘Military Innovation Studies: Multidisciplinary or Lacking Discipline?’, 16.

<sup>102</sup> Catignani, ‘Getting COIN at the Tactical Level in Afghanistan’.

<sup>103</sup> Grissom, A. (2013) ‘Shoulder-to-Shoulder Fighting Different Wars: NATO Advisors and Military Adaption in Afghan National Army, 2001-2011’, in Farrell, T., Osinga, F. and Russel, J. (eds) *Military Adaption in Afghanistan*, Stanford: Stanford University Press; Harkness K. and Hunzeker, M. (2015) ‘Military Maladaptation: Counterinsurgency and the Politics of Failure’, *Journal of Strategic Studies*, 38(6).

<sup>104</sup> Herodotus (2008) *The Histories*, (trans Wakefield, R.) Oxford: Oxford Paperbacks.

stress to maintain the group.<sup>105</sup> Building on the social-psychological approach of early group interaction theorists such as Charles Cooley and Leon Festinger,<sup>106</sup> Edward Shils and Morris Janowitz's seminal work *Cohesion and Disintegration in the Wehrmacht*, established the classical school of military group cohesion focused on the close interpersonal bonds between small-unit members that motivates them to perform in combat.<sup>107</sup> This view, which has been developed and adjusted to become known as the 'Standard Model', provided the basis for most of the research on military cohesion until the 2000s, when other social psychologists and organisational management scholars began to focus on the motivational influence that commitment to the mission – known as task cohesion – has on military group members.<sup>108</sup> While there is continued debate over which of these components of cohesion is predominant, there is general agreement that cohesion is a multi-dimensional construct whose components can be divided into three distinct categories; a social component, a task component and a group identity component.<sup>109</sup> However, crucially, nearly all of the classical group cohesion studies

<sup>105</sup> Siebold, G. (2012) 'The Science of Military Cohesion', in Salo, M. and Sinkko, R. (eds) *The Science of Unit Cohesion – Its Characteristics and Impacts*, Tampere: Finnish National Defence University, 44.

<sup>106</sup> Cooley, C. (1909) *Social Organization: a Study of the Larger Mind*, New York: Charles Scribner's Sons; Festinger, L. et al. (1950) *Social Pressures in Informal Groups: A Study of Human Factors in Housing*, New York: Harper.

<sup>107</sup> Shils, E. and Janowitz, M. (1948) 'Cohesion and Disintegration in the Wehrmacht in World War II', *Public Opinion Quarterly*, Summer 1948, 286, 291; Stouffer et al, (1949) *The American Soldier: Combat and Its Aftermath*, Princeton, New Jersey: Princeton University Press; Henderson, D. (1985) *Cohesion: the Human Element*, Washington, DC: National Defence University Press; Kinzer Stewart, N. (1991) *Mates and Muchacos: Unit Cohesion in the Falklands/Malvinas War*, New York: Brasseyes; Wong, L. et al. (2003) *Why They Fight: Combat Motivation in the Iraq War*, Carlisle Barracks, PA: Strategic Studies Institute, US Army War College; Siebold, G. (2007) 'The Essence of Military Cohesion', *Armed Forces and Society*, 33(2).

<sup>108</sup> MacCoun, R. (1993) 'What is known about unit cohesion and military performance', in *Sexual Orientation and US Military Personnel Policy: options and assessment*, Washington: RAND; MacCoun, R. et al. (2006) 'Does Social Cohesion Determine Motivation in Combat?', *Armed Forces and Society*, 32(4).

<sup>109</sup> MacCoun, R., and Hix, W. (2010) 'Cohesion and performance', in National Defense Institute, *Sexual orientation and U.S. military policy: An update of RAND's 1993 study*. Santa Monica: RAND, 139-140; Griffith, J. (2007) 'Further Considerations Concerning the Cohesion-Performance Relation in Military Settings', *Armed Forces and Society*, 34(1), 138-139; Beal, D. et al. (2003) 'Cohesion and Performance in Groups: A Meta-Analytic Clarification of Construct Relations', *Journal of Applied Psychology*, 88(6), 990-991; Dion, K. (2000) 'Group Cohesion from "Field of Forces" to Multi-Dimensional Construct', *Group Dynamics: Theory, Research and Practice*, 4(1); Hogg, M. (1992) *The Social Psychology of Group Cohesiveness: from Attraction to Social Identity*, New York: Harvester Wheatsheaf.

focus on combat forces, and the methods utilised by these schools have predominantly been based on interviews or surveys.

More recently, scholars such as King, Ben-Ari, and Hew Strachan, amongst others, have identified other important aspects of cohesion in military units, highlighting the importance of training, communication, and drills.<sup>110</sup> This understanding of cohesion is based not principally on interpersonal bonds, nor motivations, but rather on shared understandings and the practices of military professionalism that enable the group to perform effectively in combat. These authors' emphasis on professionalism, training and collective action is a key addition to the literature, and was arrived at by archival analysis, interviewing soldiers during, and closely observing units in, training and on operations to generate qualitative data. While these differing disciplinary and methodological approaches have clearly led to different conceptualisations of cohesion, again even these revisionist cohesion scholars have only focused on regular, combat forces. Indeed, to date there has been no examination of cohesion in logistics units, nor cohesion in British reserve units by either the classical or revisionist cohesion scholars.

It is clear from this review that this study addresses a number of significant gaps in the academic literature. Firstly and primarily, I provide detailed empirical evidence of the organisational and conceptual origins and evolution of FR20. In doing so, I originally and significantly contribute to the literature on the British reserves in general, and on FR20 in particular by utilising a post-Fordist conceptual framework to explain the policy and its impact. Secondly, I contribute to the professionalism and cohesion literature by providing empirical data from the reserves logistics community to argue that, although the reserves are emulating the regulars' culture to gradually

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<sup>110</sup> Strachan, H. (2006) 'Training, Morale and Modern War', *Journal of Contemporary History*, 41(2); Ben-Shalom, U, Z. Lehrer and E. Ben-Ari, (2005) 'Cohesion During Military Operations: A field study on combat units in the Al-Aqsa Intifada', *Armed Forces and Society*, 32(1); King, A. (2006b) 'The Word of Command: communication and cohesion in the military', *Armed Forces and Society*, 32(1); King, *The Transformation of Europe's Armed Forces*; King, *The Combat Soldier*, 208- 338.

professionalise, conversely their cohesion still remains fundamentally based on social bonds. I therefore argue that reserves cohesion is different to that from the regulars. Finally, in arguing that FR20 has been a ‘partial transformation’ I highlight how the distinct nature of reserve service has fused with FR20’s political origins and wider changes in society to shape this outcome.

# Chapter Two

## Definitions, Research Design, and Methods

In the last chapter, I outlined the three fundamental questions this research seeks to answer. These are: what are the historical, organisational and conceptual origins of FR20?; what is the impact of FR20 on the reserve logistics forces it was designed to transform?; and what does this experience of FR20 tell us about professionalism and cohesion in reserve logistics units and, more broadly, the transformation of the Army Reserve? In this chapter, I define the central terms this study uses to answer these three related questions and outline the methods used to investigate them. In order to make judgements on its success, it is important to set out the terms by which FR20 aims to transform the Army Reserve. Overall, FR20's objective is to increase the military capability and deployability of the reserves, through better training, equipment, and integration with the regulars. By focusing on the deployment of formed Army Reserve sub-units in particular, FR20 states it will provide 'military capability in a different way from the past to deliver the range and scale of military forces and skills required.'<sup>111</sup> Understanding what is meant by capability, and the related terms of effectiveness and readiness, is therefore the first issue to be addressed.

### **Capability, Effectiveness and Readiness**

A broad definition of capability is 'the power or ability to do something'.<sup>112</sup> The British military definition of capability is the 'combination of equipment, manpower, and

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<sup>111</sup> *Future Reserves 2020*, 8.

<sup>112</sup> Available at <http://www.oxforddictionaries.com/definition/english/capability>, retrieved 21 September 2016.

training to provide an effect or output.<sup>113</sup> This essentially physical definition is supported by less-tangible moral group attributes such as cohesion, and discipline, which are generated and maintained through sub-unit ethos and leadership to maintain professional standards.<sup>114</sup> Sub-unit capability is also related to its ability to sustain itself. Intrinsically related to capability is effectiveness: the ‘degree to which something is successful in producing a desired result.’<sup>115</sup> In sub-units, physical and moral capabilities therefore determine effectiveness. However, effectiveness is often role specific; the output on which it is judged can vary considerably between sub-units with different functions. Meanwhile, the ability of sub-units to be both capable and effective enough to execute assigned missions on operations is referred to as readiness.

The British Army uses a defined set of standards for both the capability and readiness for all regular and reserve sub-units. Reserve sub-units undergoing major transition as a result of FR20 were given two dates by which they had to deliver a certain level of capability. While these dates varied by unit, broadly speaking sub-units had to reach Initial Operating Capability (IOC) about 18-24 months after transition, while all units are to meet Full Operational Capability (FOC) in a similar time frame after IOC. While the exact sub-unit capability requirements for IOC and FOC are restricted, for a unit to be assessed as FOC it must be fully manned, qualified, and trained to the requisite standard. The FR20 schedule holds that most units should be at FOC by April 2019. Additional demands come from the readiness cycle, which is separate to the FR20 capability schedule. Across British defence a system is used which assesses units’ readiness in terms of manpower, equipment and collective training.<sup>116</sup>

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<sup>113</sup> Interview 17.

<sup>114</sup> Ministry of Defence (2014) *Joint Doctrine Publication 0-01* (JDP 0-01), 5th Edition, Swindon: Development, Concepts and Doctrine Centre, 25.

<sup>115</sup> Available at <https://en.oxforddictionaries.com/definition/effectiveness>, retrieved 21 September 2016

<sup>116</sup> National Audit Office (2005) *Assessing and Reporting Military Readiness* available at <https://www.nao.org.uk/wp-content/uploads/2005/06/050672es.pdf>, retrieved 7 September 2016.

The readiness cycle is used to bring units up to readiness for potential deployment, and can consist of boosts to manpower, equipment and intensified collective training. Reflecting their difficulties in deploying fully trained and qualified personnel, reserve sub-units' requirement to be at readiness is usually much lower than their established strength. For example, a reserve sub-unit could be required to deploy a section of eight personnel – all qualified in the rank they hold – to support a regular unit on the first roule of a deployment. While the sub-unit could probably fill this requirement whilst only at IOC, its ability to sustain this requirement over subsequent roules would be affected if it was not at FOC. Understanding FR20's capability, effectiveness and readiness requirement is therefore central to answering the question of how the policy has impacted the selected sub-units.

### **Post-Fordism and Military Logistics**

It is important to note that while post-Fordism is an analytical term that academics have coined to usefully describe the changes happening in some Western militaries since the 1990s, the wider UK defence establishment, nor the British Army in particular, use the term. Nor should they. It is important to stress here that no military officer would consciously describe themselves as a 'post-Fordist'. Indeed, during the research for this thesis, when I used the term, I was directly asked what this meant by both a former Chief of the General Staff (CGS), and by a Colonel responsible for implementing future logistics doctrine and concepts.<sup>117</sup> Nevertheless, when I explained the four tenets of post-Fordism, both immediately concurred it was an accurate term to describe the process ongoing in the army and its logistics component. Thus, while the terms post-Fordism and post-Fordist principles are used throughout this work, it must be stressed that although the army has implemented these four central tenets, it has not done so self-consciously. More, as I show in Chapter Five, they have emulated business best practice

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<sup>117</sup> Personal communication, General Sir Peter Wall, 10 May 2016; Interview, senior British Army logistics officers responsible for future doctrine, 9 June 2015.

in doing so. As such, throughout this work I provide evidence of the processes of post-Fordism within British military logistics rather than argue that the British military has consciously implemented a post-Fordist logistics ‘model’ as it were.

While Martin Van Creveld, John Lynn, and Thomas Kane, amongst others,<sup>118</sup> have all provided their own definitions of logistics, these are problematic, or ignore the increasingly important role of medical services.<sup>119</sup> The latest US definition—published in *Joint Warfare Publication 4-0: Logistics* – is: ‘planning and executing the movement and support of forces’.<sup>120</sup> It defines the core logistics functions as: ‘deployment and distribution, supply, maintenance, logistic services, operational contract support, engineering, and health services.<sup>121</sup> Britain’s 2015 *Joint Doctrine Publication 4-0: Logistics for Joint Operations* uses the NATO definition of logistics as ‘the science of planning and carrying out the movement and maintenance of forces’<sup>122</sup> before outlining that this includes the: ‘design and development, acquisition, storage, movement, distribution, maintenance, recovery and disposal of materiel; the transport of personnel; the acquisition or construction, maintenance, operation, and disposition of facilities; the acquisition or furnishing of services; and medical and health service support.’<sup>123</sup> However, it is the author’s contention that a simple unifying principle unites these definitions: *support to military forces synchronised through space and time*. In short, military logistics from the ancient to the modern era has always been about *getting the required quantity and quality of material and services, to the correct place, at the*

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<sup>118</sup> Uttley, M. and Kinsey, C. (2012) ‘The Role of Logistics in War’, in Strachan, H. (ed) *The Oxford Handbook of War*, Oxford; Oxford University Press.

<sup>119</sup> Van Creveld, M. (2009) *Supplying War*, Cambridge: Cambridge University Press, 1; Lynn, J. (1993) *Feeding Mars: Logistics in Western Warfare from the Middle Ages to the Present*, Michigan: Westview Press, ix; Kane, T. (2001) *Military Logistics and Strategic Performance*, London: Routledge, 2.

<sup>120</sup> US Department of Defense (2013) *Joint Warfare Publication 4-0: Logistics*, para GL-7, available at [http://www.dtic.mil/doctrine/new\\_pubs/jp4\\_0.pdf](http://www.dtic.mil/doctrine/new_pubs/jp4_0.pdf), retrieved 12 September 2016.

<sup>121</sup> Ibid, x.

<sup>122</sup> Yoho, K. et al. (2013) ‘Defence logistics: an important research field in need of researchers’, *International Journal of Physical Distribution and Logistics Management*, 43(2), 81.

<sup>123</sup> Ministry of Defence (2015) *Joint Warfare Publication 4-0: Logistics*, 4th Edition, Swindon: Development, Concepts and Doctrine Centre, 4.

*correct time, and in the correct order, to ensure military forces are as capable as possible.* This definition is used here. At the same time, I acknowledge that this work cannot address each and every element of military logistics contained above, and will instead focus on specific areas where British, US and NATO logistics processes and practices have been transformed.

British, US and wider NATO militaries are examined in this study as these have been the most deployed Western forces over the past twenty five years. The British example provides the context for the transformation of its reserve logistics component, while the relevance of the US is also important as, as will be shown, British logistics transformation has usually emulated the US military. Combined, these logistics chains have also continually sustained the largest deployments of soldiers in hostile areas of the Balkans, the Gulf and Afghanistan over the last 20 years. Moreover, the US, the UK, and to a lesser extent NATO, have adopted new methods of sustaining these forces; other powers' militaries, such as those of China and Russia – despite modernisation drives – have not yet transformed their logistics systems to similar degrees, raising interesting strategic questions about how they compare with the privatised, expeditionary and contingency-based logistics systems of the West. Chapter Five's greater emphasis on land forces also reflects the fact that these have been the most heavily deployed and engaged during the past two decades.

### **Research Design**

In *Military Power*, Stephen Biddle sets out to prove that the modern system of military employment, especially that of the West, is central to understanding these forces' success on the battlefield. Contrasting arguments about numerical or technological preponderance, Biddle shows in a detailed fashion that the modern interrelated system, which he defines as comprising the principles and practices of 'cover, concealment, dispersion, suppression, small unit independent manoeuvre and combined arms at the

tactical level, and depth, reserves, and differential concentration at the operational level of war', is crucial for battlefield success.<sup>124</sup> Despite the complexity of the system he describes, Biddle is able to support his claims through a rigorous methodological approach reliant on the triangulation of data from separate sources and methods. Firstly, he draws on qualitative archival and secondary source material to examine previous cases. Secondly, he uses separate quantitative datasets to compliment the cases and test his theory. Finally, he uses military simulations to test his arguments in practice. Biddle's results are complimentary and conclusive due to triangulation, and represent an innovative approach to social science research on the military.

While it proved impossible to conduct simulations for this project, the system of triangulation was utilised to provide a solid methodological base for the research. Overall, following Biddle, an interdisciplinary, mixed-methods approach was used to address different aspects of the central question. Indeed, the problem of utilising a single literature or method approach to assess FR20 as a transformation is similar to those found in other subjects. Richard Lebow has noted that scholarly enquiry in general can be conceptualised as a matrix 'with problems representing the horizontal dimensions and disciplines the vertical one.'<sup>125</sup> Thus single approaches cannot fully capture many of the issues they seek to understand. At the theoretical/philosophical level, Paul Cilliers has also noted the friction in 'the relationship between our descriptions of the world and the world itself.'<sup>126</sup> Both points seem particularly pertinent to the different approaches to cohesion in particular, and to the diversity of FR20's impacts in general. A multi-literature, mixed-methods approach is therefore followed here to understand as much of the FR20 'problem' as possible. Thus, in the first three empirical chapters I examine the historical origins, politico-organisational evolution,

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<sup>124</sup> Biddle, S. (2006) *Military Power*, Princeton: Princeton University Press, 3.

<sup>125</sup> Lebow, R. (1988) 'Interdisciplinary Research and the Future of Peace and Security Studies', *Political Psychology*, 9(3), 509.

<sup>126</sup> Cilliers, P. (2000) 'Rules and Complex Systems', *Emergence*, 40(3).

and the conceptual framework of FR20 using the military transformation and post-Fordist literature. In the subsequent chapters, I show how this context explains the policy's impact on sub-units' capability, professionalism and cohesion, using both the Standard Model and collective action approaches to cohesion in particular. This evidence is then used to draw implications for professionalism and cohesion in reserve service more broadly. In the final chapter, I discuss what this transformative attempt highlights about British civil-military relations and British society in general.

A further word on the specific methods used to assess cohesion and readiness in the selected sub-units is required here. As noted in the last chapter, the classical social psychology focus on the social, task and group identity components of cohesion primarily involves asking members about their experiences of the group. Within this approach, the Standard Model uses questionnaires to produce comprehensive analyses of unit cohesion, and has been utilised by the US, UK, Israeli, Canadian and Finnish armies.<sup>127</sup> However, as the proponents of this approach admit themselves, the survey approach is limited to ascertaining unit members' *attitudes* toward their units and their *perceptions* of unit cohesion.<sup>128</sup> As such, the Standard Model offers a snapshot – albeit a highly-informed and complex one – of cohesion. While results of the Standard Model have been correlated to later collective performance, this approach does not assess the interactions which constitute collective performance themselves. Related to this issue is the concept of causality. While there may be some direct causal relationships, even the multiple regressions of the Standard Model cannot prove causality in cohesion – at best they indicate a moderate correlation ( $r = .4$ ) between higher cohesion and higher performance,<sup>129</sup> whilst the strongest relationships between the components of cohesion

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<sup>127</sup> Siebold, 'The Essence of Military Cohesion'; Salo, M. (2011) *United We Stand – Divided We Fall: A Standard Model of Unit Cohesion*, Helsinki: Department of Social Research, Helsinki University.

<sup>128</sup> Siebold, 'The Science of Military Cohesion'.

<sup>129</sup> Siebold, 'The Science of Military Cohesion', 50; Oliver, L. et al. (1999) 'A Qualitative Integration of the Military Cohesion Literature', *Military Psychology*, 11(1).

and cohesion itself – for example the effect of good leadership on the unit – can also only be moderately correlated ( $r = .6$ ).<sup>130</sup> Similarly the Standard Model is also open to critique because, as Hogg has identified, social psychology's 'group level theories readily tend to dissolve into theories of interpersonal processes'.<sup>131</sup>

A similar accusation can be made against King and Ben Ari's collective action approach that observes performance but lacks the same depth of focus on social bonds between individuals. As such there is a distinct difference in level of analysis. As discussed in Chapter Seven, King, and others, have insightfully shown that there *are* relationships between interpersonal bonds and effective collective performance. But here it can be argued that in seeing the causes of cohesion at the group level, theories of the importance of collective action have necessarily excluded some individual level factors. So much depends on definitions and level of analysis in studying cohesion that the limitations of cohesion research must be borne in mind. Indeed, conceptually, to date only one side of the cohesion 'box' has been the primary focus for academic study at a single time. This study seeks to change that by incorporating both approaches and methods.

### **Case Selection, Sources and Methods**

The research used primary and secondary sources, individual and group interviews, longitudinal surveys, and fieldwork observations. Primary and secondary sources were used to address the questions concerning FR20's context. Once this had been completed, qualitative data on reserve logistician's perceptions of the impact of the transformation on their sub-unit's effectiveness and cohesion was collected through individual and group interviews and field observations. This was simultaneously complimented by quantitative data collection involving three surveys of logistics

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<sup>130</sup> Siebold, 'The Science of Military Cohesion', 50.

<sup>131</sup> Hogg, *The Social Psychology of Group Cohesiveness*, 54.

reservists. While secondary source research was conducted from 2012, access was only granted to speak to and survey soldiers in February 2015 after an 11-month delay caused by the requirement that the Ministry of Defence Research Ethics Committee approve the project. The research was also approved by the University of Exeter's Ethics Committee. All participants consented to taking part and most participants were anonymised, but those senior officials quoted gave their consent to be cited.

The research focus on the reserve logistics component was suggested by the army as this area of the overall FR20 transformation was deemed at higher risk than in the combat arms, such as the infantry. This was for a number of reasons, but mainly because the changes that some logistics units had to undergo in order to provide the required capability – including forming new units, changing base locations or re-roling into a new trade – represented major organisational changes that would require considerable time and effort to implement. Even taking this into account, the transformation of the army reserve logistics component as a whole was not seen as guaranteed. *As a result, it must be made very clear from the outset that this thesis used a sample of logistics units within which some had undergone profound organisational change as a result of FR20.* This sampling was intentional as the research question was firmly based in both the logistics component and the transformation literature, and sought to understand factors affecting change in these units. *It is therefore recognised that the logistics reserve component may have proved more difficult to transform than other components, where experiences of transformation may have been more positive.* For example, it was beyond the scope of this study to examine in detail the experiences of infantry units. Nevertheless, in the quantitative chapter I have incorporated data from regular and reserve infantry and logistics units for comparison. It is also important to note that these comparisons are not statistically representative to their respective wider populations and are indicative only. However, anecdotal evidence suggests that while

some of the organisational issues identified in the logistics units are unique to them, other issues have been identified in other units with different military functions.

Given the limitations of a single researcher in this project, geography was an initial constraining factor in case selection. However, the varied use of methods allowed some mitigation of this through the research design: I conducted fieldwork with a unit close by, undertook group interviews with those further afield, and surveyed units from all over the UK. Overall, these units were selected by the army to cover a diverse spectrum of locations and experiences of FR20. The fieldwork unit and the group interview units were selected by case as they had undergone some sort of organisational change as a result of FR20. The surveyed units were a mix of those that had and hadn't. A final word is also needed about sub-unit experiences themselves. The experiences of units of 60 personnel are conducive to being shaped by individual personalities, especially of leaders. They can therefore vary depending on personalities and leadership. As this fact is pertinent to almost all units this does not negate the evidence presented here; it just must be noted that some variance can be explained by personalities and leadership in sub-units.

Finally, although the research was conducted over a four year period, due to the length of time it took MoDREC to clear the project, I only had 18 months or so to directly speak with soldiers and conduct fieldwork. FR20 is scheduled to be an almost six year transformation. Thus, while interviews with senior officials began in 2014, and longitudinal data was later collected from soldiers, the data concerning the sub-units experiences of FR20 presented in this thesis has been primarily collected from the second quarter of FR20's projected lifespan. The evidence presented here therefore needs to be treated with some caution, as FR20 will still have over two years to run after the research phase for this project ended. Nevertheless, the period that the research covered was an important one, distinguished by a major effort to solve organisational

problems identified in the first three years of the policy's introduction, and included the first manifestations of the impact of organisational change. While this period may have skewed the data somewhat, it is also conceivably a period where FR20 should have been starting to gain major momentum, given the resources and effort being expended at this time. Moreover, where possible I have attempted to enrich the data from outside the logistics community in order to situate the findings within the broader reserve experience. As such, while any assessment of a six year policy at the halfway point in its life-cycle is limited, and further developments no doubt will occur, I have made every effort to identify enduring issues that are likely to shape FR20's impact in the future.

### **Primary and Secondary Source Documents**

Primary and secondary source documents were predominantly used to inform the chapters explaining the context of FR20. These draw on a wide range of documents. The third chapter on the previous periods of reserve reform is situated within the organisational transformation literature and is primarily based on secondary historical sources. A note is perhaps required here on the sources for this chapter. While both the Cardwell-Childers and Haldane reforms have received much scholarly attention, the reserves aspect of their plans have received considerably less so.<sup>132</sup> As a result, this chapter utilises the limited number of major works which have done so. Beckett is one of two of the world's leading expert on the Volunteers and the Territorial Army, and his *Riflemen Form, and Territorials: A Century of Service* are used throughout, as are those by the other expert, Edward Speirs. David French's *Military Identities* was also

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<sup>132</sup> Tucker, A. (1963) 'Army and Society in England 1870-1900: A Reassessment of the Cardwell Reforms,' *Journal of British Studies* 2(2); Speirs, E. (1980) *Haldane: An Army Reformer*, Edinburgh: Edinburgh University Press, 4-7; Satre, L. (1976) 'St John Brodrick and Army Reform 1901-1903', *The Journal of British Studies*, 15(2); Haldane, R. (1929) *Richard Burdon Haldane. An Autobiography*, London: Hodder and Staunton, 2<sup>nd</sup> edition; Koss, S. (1969) *Lord Haldane: Scapegoat for Liberalism*, New York: Columbia University Press; Speirs, E. (1994) 'The Late Victorian Army 1868 -1914' in Chandler D., and Beckett, I. (eds) *The Oxford History of the British Army*, Oxford: Oxford University Press; Higgens, S. (2010) 'How was Richard Haldane able to reform the British Army?' Unpublished MPhil dissertation, University of Birmingham.

thoroughly useful, while Peter Dennis' *The Territorial Army 1907-1940* covers the impact of the Haldane reforms. Walker's *Reserve Forces and The British Territorial Army* is also used for cross reference, and where possible I have utilised other publications and documents.

Chapter Four, which discusses the political origins of FR20, was primarily based on elite interviews with senior military and civilian officials involved with the policy, close textual analysis of Ministry of Defence FR20 documents as the policy evolved, and other related official documents. This was supported by think-tank publications and numerous newspaper and news agency reports, including *The Times*, *The Guardian*, *The Daily Telegraph*, *BBC*, *The Evening Standard* and (even) *The Daily Mail*. The fifth chapter on post-Fordism is based in the industrial and military sociology literature and draws together literature from the business and military logistics disciplines to advance conceptual understanding of the recent transformation in military logistics. Other secondary sources include bespoke military publications and doctrinal documents. Primary sources include US newspapers, government publications and interview data, complimented by credible websites. As detailed below, the group interview and fieldwork data was used to predominantly inform the empirical chapters concerning the impact of FR20 on capability, professionalism and cohesion, while the final quantitative chapter relied mainly on the survey data. However, this was not exclusive; some survey data is used to support the qualitative chapters and vice versa, as is secondary source data.

### **Qualitative Primary Sources:**

#### **Individual and Group Interviews:**

Individual interviews were conducted to gain insight into how the FR20 policy was formed, the exact intent of the plan in relation to reserve logistics units, and to give

context to the data collected in the group interviews. Informal interviews also took place during the fieldwork. Overall 16 formal and nine informal interviews were conducted. These 25 interviews consisted of a serving minister; two former defence ministers; a serving and a former Chief of the General Staff; three generals involved in different aspects of FR20; and two brigadiers and two colonels involved in logistics and the reserve component. Others included sub-unit commanders. These were selected on the case relevance basis; people whose positions and roles indicated they would be informed on the subject. Some of these personnel were interviewed twice. Interviews took place in various locations, including Army Headquarters in Andover and Whitehall, the House of Commons, unit locations, and on Skype, while some participants were interviewed twice in order to clarify earlier points. Interview data was recorded in notebooks, and in some cases on a Dictaphone with the participant's permission. These recordings were then transcribed. Informal interviews usually occurred during the fieldwork with officers and soldiers from the respective sub-units.

This data was recorded in a notebook.

While there is ambiguity in the academic literature on the difference between a 'focus group' and a 'group interview', the group interview approach adopted here was not primarily interested in the transactional nature of opinion formation traditionally associated with focus groups.<sup>133</sup> Instead, the simpler group interview method was adopted to allow the researcher to quickly gain as many qualitative insights as possible into the issues being discussed, and to ensure that individual responses were representative of the wider group. Four sub-units were initially selected for the group interviews. These sub-units were selected in consultation with the army chain of

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<sup>133</sup> Kitzinger R., and Barbour, J. (1999) 'Introduction: the challenge and promise of focus groups' in Kitzinger, R. and Barbour , J. (eds.) *Developing Focus Group Research*, London: Sage, 1; Albrecht, T. et al. (1993) 'Understanding Communication Processes in Focus Groups' in Morgan, D. (ed.) *Successful Focus Groups*, London: Sage, 52; Morgan, D.(1988) *Focus Groups as Qualitative Research*, London: Sage, 12.

command to represent a broad spectrum of locations and experiences of FR20, and also to be reflective of the 3:1 reserve RLC: REME population ratio. Of note is that of these sub-units, three had either been newly created or changed their role as a result of FR20, with one of the others changing their base location. The group interview sample was therefore intentionally weighted toward sub-units that had undergone organisational transformation, as the research goal was to examine the impact of FR20 in those units the army deemed higher risk when implementing the policy. As a result, group interview responses could conceivably be more negative than the wider reserve REME/RLC population due to the greater organisational frictions experienced. Nevertheless, as discussed below, this issue was mitigated by the inclusion of survey data from a different sample from the wider population. Indeed, as the research continued, an additional set of interviews in another REME sub-unit were conducted to triangulate the data from the initial REME unit after it emerged that the latter had had a very positive experience of FR20 that may not have been representative of other sub-units in the same battalion.

The researcher visited each sub-unit to explain the nature of project and request individuals' participation before the group interviews were undertaken. The group interviews varied in size from two participants in some cases to approximately 15 in one other. The average was 6-8. In order to encourage honest responses, groups were separated by rank to include: officers and senior non-commissioned officers (NCOs); NCOs; and privates and Junior NCOs (JNCOs). Interviews took place on unit premises, eg in messes during duty hours. To collect longitudinal data reflective of the long-term FR20 plan, interviews were conducted twice in two of the four sub-units; in May-July 2015 and in the same period in 2016.

The group interviews were semi-structured, with the same set of questions delivered to each group, but with the scope to explore different themes as they emerged.

The list of group interview questions are available at Annex B, but broadly, they sought to examine the nature of the units before FR20, and then what had changed as a result of it, across a number themes. Interviews usually lasted 45-60 minutes. In total, 14 group interviews were conducted. Responses were recorded on a digital Dictaphone and in handwritten notes. To improve reliability, the group interview data was transcribed and then analysed to identify common response themes using the NVivo coding software. Initial coding identified potential major themes and sub-themes. Full coding was based on respondents' dialogue which was then grouped together to create data nodes. These nodes were then searched for data that supported or refuted their proposed themes. Connections between overlapping themes and deviations from coded material were identified, allowing the themes to be defined and refined. Published responses were then chosen on the basis of representativeness.

## **Fieldwork**

As discussed in Chapter One, the ability to perform collectively is widely recognised as a key source of cohesion in infantry units. Field observations were conducted to collect qualitative data on the importance of collective training in reserve logistics units, and to triangulate this with the interview and quantitative data. While participant observation has a long tradition in anthropology,<sup>134</sup> it is also an increasingly common qualitative approach amongst the revisionist cohesion scholars and involves the researcher closely observing military units as they train on exercises and in their on-duty hours.<sup>135</sup> This approach differs markedly from the classical cohesion scholars' emphasis on interviews

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<sup>134</sup> Malinowski, B. (1929) *The sexual life of savages in north-western Melanesia: an ethnographic account of courtship, marriage and family life among the natives of the Trobriand Islands, British New Guinea*. New York: Halcyon House; Evans-Pritchard, E. (1940) *The Nuer, a description of the modes livelihood and political institutions of a Nilotic people*, Oxford: Clarendon Press; Geertz, C. (1984) 'From the Native's Point of View: on the nature of anthropological understanding,' in Shweder, R. and LeVine, R. (eds) *Culture Theory: essays on mind, self, and emotion*, New York: Cambridge University Press.

<sup>135</sup> King, *The Combat Soldier*; Ben Shalom et al. 'Cohesion During Military Operations: A field study on combat units in the Al-Aqsa Intifada'; Wong et al. 'Why They Fight'.

and surveys, and has produced markedly different understandings of cohesion as a result.

Following James Spradley, a moderate participant approach was utilised for the fieldwork.<sup>136</sup> Participant observation is conducive to a better understanding of the ‘life world’ of sub-units and how they perform collectively. Furthermore, a deeper understanding of the successes and challenges associated with FR20 in the sub-units was gained.<sup>137</sup> Finally, as the sub-unit was visited by the researcher frequently, it allowed rapport to be built with personnel. This generated qualitatively rich data to support the interviews and surveys. The particular sub-unit that was observed was selected by the army and I on key case study criteria (eg. the unit had undergone major transformation as a result of FR20), representativeness (RLC rather than REME unit) and location. I visited this unit on four separate occasions in barracks to observe their training and joined them on training exercises in the field on two further occasions to observe the nature of their trades. Observation data was recorded in a notebook and using a camera to capture the nature of collective performance and equipment used by the unit.

### **Quantitative Primary Sources: Survey**

Given the high-risk nature of the reserve logistics development as articulated by the Director General Army Transformation, Major General Kevin Abraham,<sup>138</sup> the army were especially interested in quantitative analysis that could inform the implementation of FR20. As a result a number of surveys were conducted. The first, which is not referred to in detail in this thesis, concerned recruitment and retention in reserve RLC and REME units and was completed in January 2015. It was used to inform policy,

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<sup>136</sup> Spradley, J. (1980) *Participant Observation*. Orlando, Florida: Harcourt College Publishers, 58-62.

<sup>137</sup> Husserl, E. (1970) *The Crisis of European Sciences and Transcendental Philosophy*, (trans Carr, D.) Evanston: Northwestern University Press, 108-9.

<sup>138</sup> Interview, Major General Kevin Abraham, Andover, 14 January 2014.

resulted in a new set of questions on the Ministry of Defence's annual Reserve Continuous Attitudes Survey (ResCAS), and its results have recently been published. Some of these findings are used to support qualitative data presented herein.

In an attempt to integrate the sharp methodological and conceptual distinction between the traditional and more recent cohesion literature, I collected quantitative data to increase triangulation. Therefore, following Guy Siebold's 'Standard Model of Cohesion' the research undertook a longitudinal survey to generate data on reservists' perceptions of the impact of FR20 on cohesion and readiness in their sub-units. The survey (see Annex C) drew heavily on already-established surveys used by the US, British and Israeli armies to measure soldiers' attitudes to sub-unit cohesion and readiness. The survey contained two sub-questionnaires: the modified Platoon Cohesion Index (PCI) and the Sub-Unit Readiness and Morale questionnaire. The PCI has been shown to be a reliable and quick measure of unit cohesion, and the only modification made was to change the level of analysis to the sub-unit level. This allowed an examination of cohesion to be undertaken across horizontal, vertical and organisational bonding scales at this level of analysis. The Readiness and Morale questionnaire measures soldiers' attitudes to morale, confidence in equipment and leaders, and overall unit readiness for operations. Using these already established questionnaires also allowed comparison with previous research. Near the end of the survey a set of questions acted as a criteria scale for the earlier scales.

The survey was delivered twice in a 12 month period. One major issue identified with longitudinal surveys in the army especially is the high turnover of personnel which can affect the stability of data. Unfortunately, as MoDREC required the full anonymisation of data, it was impossible to track individual soldiers. While this is a methodological weakness, stable response rates in the selected sub-units were able to mitigate this somewhat. Indeed, the moving of individuals away from the unit, or the

introduction of new members is viewed as representative of the social life of the sub-unit, and the response rates in the selected sub-units were stable enough that weighting was not needed. Similarly, changes in leaders and deployments can also account for changes in cohesion and readiness. These were taken into account in the research. Any major changes in the sub-units circumstances were identified in consultation with the chain of command and used to inform the subsequent analysis.

### **Survey Aims and Hypotheses**

Based on the ‘Standard Model’ literature, this study set out to achieve the following:

- a. For the first time, gather specific cohesion and readiness data on RLC and REME reservists. In particular, investigate the levels of cohesion amongst certain sub-units that have undergone organisational change as a result of FR20.
- b. Gather longitudinal data on REME and RLC reservists’ experiences of working with the Regulars and of the impact of the FR20 reforms to date.
- c. Determine whether the PCI is an accurate and useful tool when applied to the British Army Reserve and whether it may aid 360-degree reporting.

Hypothesis 1: Reservists’ perceptions of cohesion and readiness should increase as a result of the FR20 reforms as the force is professionalised and better equipment, training, and resources are directed toward the reserve logistics population in general and specific sub-units in particular.

Hypothesis 2: Following previous research, sub-units with higher cohesion should report higher levels of readiness and morale.

Hypothesis 3: Given the importance of social bonds in the reserves (See Chapter Eight), reserve sub-units should display higher scores for affective (social) bonds on the PCI scales than their regular colleagues. Conversely, regular sub-units should report higher instrumental (task) bonds.

Descriptions of the surveys' sample size, design and scale validity are available in Annex A.

### **Conclusion**

Overall, the methodologies outlined above were chosen to generate the richest forms of qualitative and quantitative data to ensure triangulation and increase the validity of the evidence. While each method is used predominantly in certain chapters, the data is presented in a way that incorporates all the relevant evidence to support the argument being made. This interdisciplinary, mixed-methods approach is a novel means of conducting cohesion research in particular, and also marks the first time that cohesion research on British reserve forces, or their logistics component, has been undertaken. First, however, it is important to understand how previous periods of reserve transformation have organisationally manifested themselves in order to gain a better understanding of FR20's possible trajectory.

## Chapter Three

### Balancing Budgets, Strategy and Recruitment: Previous Reserve Reforms

As outlined in Chapter One, the British Army, and the Army Reserve, is currently in a period of profound organisational transformation. On the one hand, this attempt to re-organise the Army Reserve for complex and diverse 21<sup>st</sup> Century missions appears to be a response to the strategic uncertainty of an increasingly globalised world.<sup>139</sup> As is discussed in detail in Chapter Five, the desire for more professional and adaptable reserve forces is itself symptomatic of what academics have described as the post-Fordist approach to military organisation that has developed in this era, primarily in order to generate greater efficiencies. Understanding this approach is central to an understanding of the attempted transformations in logistics sub-units. This chapter, on the other hand, examines the historical context of previous attempts to change British reserve land forces to show how the current attempt at transformation is perhaps less novel than it initially appears. It shows that the impetus for transforming the army's reserve forces have remained remarkably similar during the 'classical' modern period and that of 'late' modernity.<sup>140</sup> Indeed, the dynamic interplay between budgetary constraints, strategic rationale, and recruiting the reserve force has heavily influenced the decision to implement – and ultimately the effectiveness of – the previous three major attempts to transform the reserves. While this chapter shows that attempts to reform the reserve are cyclical – they represent an attempt to change a military organisation response to changed strategic, economic and operational circumstances –

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<sup>139</sup> HM Government, *Securing Britain in an age of uncertainty: the Strategic Defence and Security Review*, 9, paragraph 1.4.

<sup>140</sup> Giddens, A. (1990) *The Consequences of Modernity*, Cambridge: Polity.

crucially, it also shows that the organisational solutions to the problems these changed circumstances present are historically specific. Moreover, each previous attempt at reserve transformation has been politically-imposed rather than undertaken by the army of its own volition.

How stakeholders influence policy outcomes has been excellently highlighted by Graham Allison in his dissection of American and Soviet strategic rationale, bureaucratic politics, and organisational process during the Cuban Missile Crisis, which Posen heavily drew on in his seminal study on transformation.<sup>141</sup> Both Allison and Herbert Kaufmann, amongst others, have argued that organisations transform when intense pressures build up around them to force change in order to ensure their continued viability.<sup>142</sup> Transformational leaders and the acquiescence of internal elites are needed to drive through this change, but in meeting organisational resistance, these changes are negotiated and modified. The net result is that the organisation adapts. But these adaptions are not dramatically new, they are instead a re-booted version of procedures the organisation is already familiar with. Organisational change thus occurs through, and is modified by, the interplay of its parts. This chapter seeks to identify the key roles of stakeholders in previous reserve army reforms and explain how they shaped their outcomes, in order to better understand the current transformation. This historical analysis is central to my argument as not only does it show the continuities with previous attempts to change the army reserve, it also highlights how the latest, post-Fordist approach is an organisationally novel attempt to solve enduring fiscal, strategic and organisational problems.

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<sup>141</sup> Allison, G. (1971) *The Essence of Decision: Explaining the Cuban Missile Crisis*, Boston: Little and Brown.

<sup>142</sup> Kaufmann, H. (1971) *The Limits of Organisational Change*, Alabama: University of Alabama Press.

## The Cardwell-Childers Reforms: A First Attempt at Integration

Although the origins of the Army Reserve date back to the fylds of the Anglo-Saxon period,<sup>143</sup> it was not until Henry II's Assize of Arms in 1181 and Edward I's Statute of Westminster in 1285 that the military obligation of freemen to defend the community became enshrined in England. The need for continental armies in the mid-sixteenth Century saw the first of the Militia statutes in 1558, effectively incorporating the Militia into a formal existence, which remained in place despite periods of repeal until the twentieth century.<sup>144</sup> Growing government regulation and the gradual professionalisation of the army and its reserve forces over this period has been charted by numerous scholars.<sup>145</sup> By the mid-1860s, Britain's army reserve forces were essentially organised in two systems whereby those who volunteered for the Militia would complete a few months' initial training and then return to civilian life on the understanding that they would undertake a few weeks' annual refresher training. The Militia's mission was defence against invasion (although it was used in a public order role when required) and those serving in it, who were mainly drawn from agricultural areas, signed up for five years, on the condition that – unlike the regular army – they could not be deployed overseas nor posted outside their regiment. The Yeomanry was the cavalry arm of the Militia and served under the same conditions. The other part of the system was represented in the more urbane Volunteers who had been created in 1859-60 as a result of the public's largely imaginary fears of an imminent French invasion. The Volunteers consisted of mainly riflemen, gunners and engineers who, like the Militia and Yeomanry, had been recruited locally and could also not be compelled to serve overseas. However, unlike the Militia who were more closely controlled by the

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<sup>143</sup> Walker, *Reserve Forces and The British Territorial Army*, 11; Beckett, I. (2008) *Territorials*, 3.

<sup>144</sup> Beckett, *Territorials*, 3-4.

<sup>145</sup> Mallinson, A. (2011) *The Making of the British Army*, London: Bantam; Beckett, *Riflemen Form*; Cunningham, *The Volunteer Force*.

state, the Volunteers had originally funded and equipped themselves, representing ‘the military expression of the spirit of self-help, Victorian capitalism in arms.’<sup>146</sup>

Although on paper the Militia was 130,000 strong and the Volunteers numbered over 160,000 by 1868, both the Crimean War and the Indian Mutiny had exposed the inability of Britain’s reserve system to mobilise the required numbers of second line troops when the army deployed overseas.<sup>147</sup> Moreover, by the late 1860s, the Yeomanry and especially the Volunteers were in decline, as both forces fell out of fashion with the landed gentry and upper middle classes that supplied them with the officers and recruits and, decisively, the donations they required to function.<sup>148</sup> As the problem worsened, prominent Volunteers in Parliament began lobbying for increased government funding to make up the budget shortfalls of the supposedly self-sufficient Volunteers.

While the Volunteers had cost the state just £3,000 (£250,000 today) in 1860, by 1897 total government expenditure on them was £697,000 (over £70 million),<sup>149</sup> even though the size of the force remained relatively stable during this period. Moreover, this growing drain on the government’s coffers was occurring precisely at a time when the army was being increasingly criticised, both by the Radicals who detested the aristocratic nature of army – especially the practice of purchasing commissions – and by some officers concerned about the army’s and the reserve’s military effectiveness. Such criticism was justified: between 1864 and 1869 spending on the Army and Ordnance far exceeded that for any other branch of government, eclipsing funding for the Navy by an average of £4 million per annum (£420 million today).<sup>150</sup> A considerable proportion of these costs paid for soldiers’ pensions rather than for effective military capability, while doubts about the Volunteer’s effectiveness had already led to an attempt in 1867 to

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<sup>146</sup> Cunningham, *The Volunteer Force*, 1

<sup>147</sup> French, D. (2005) *Military Identities: The Regimental System, the British Army and the British People*, Oxford: Oxford University Press, 12.

<sup>148</sup> Walker, *Reserve Forces and The British Territorial Army*, 13.

<sup>149</sup> Beckett, *Riflemen Form*, 138.

<sup>150</sup> French, *Military Identities*, 12.

create an ‘Army Reserve’ of 20,000 men that had failed miserably.<sup>151</sup> As such, there was a growing realisation within government that the army and the reserves needed to be reorganised to guarantee both better efficiency and value for money. It is important to stress that this political desire to reduce the military budget was the primary driver of the forthcoming reforms. But the drive to make these forces more economical and efficient also fused with the strategic situation, coming as it did after a major war and during continued colonial withdrawal from Canada, Australia and New Zealand.<sup>152</sup> Indeed, it is noteworthy that one of the most immediate impacts of the subsequent reforms was the reduction in colonial garrisons by over 25,000 men between 1869 and 1871, at considerable savings to the War Office.<sup>153</sup>

Yet the withdrawal from the New World was not the only strategic rationale to influence the forthcoming organisational reform of the army and reserves. Poorly trained Union volunteer units had not performed well in the opening stage of the American Civil War. This was in stark contrast to the Prussian militia units whose recent victories in Europe had demonstrated the importance of thorough training and discipline in battle. Moreover, as British studies had concluded, the Prussian system of localised recruitment and the pairing of Line, Reserve and Landwehr (militia) units allowed fast mobilisation and rapid expansion of the Prussian army in wartime. Indeed, such was the strategic and organisational success of this system in defeating the Austrian and French armies that, echoing Farrell’s observations on military emulation, it formed the blueprint for the reforms instigated by the Secretary of State for War, Edward Cardwell. As Julian Brazier has shown, General Garnett Wolseley was also

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<sup>151</sup> French, *Military Identities*, 12.

<sup>152</sup> Speirs, ‘The Late Victorian Army 1868 -1914’, 191.

<sup>153</sup> French, *Military Identities*, 14.

instrumental in driving the wider reform of the army and ensuring the reform of the reserves was integrated with it.<sup>154</sup>

However, the Cardwell reforms were also as much a product of the dominant ideology at the time as they were the economic and strategic context. The 1867 Reform Act had committed the Liberal government to a wider economic and social programme by extending the franchise, and the reform of army became a means by which the Liberals hoped the working class would be lifted from poverty into respectability and thus become better integrated into the political life of the nation. As David French has shown, the Radicals hoped the army would become ‘a powerful instrument for national education in a powerful and high sense’ as a result of the introduction of new short-service contracts.<sup>155</sup> This ideological element of the reforms was taken up by Gladstone himself, who argued that the introduction of new local depots would ‘diminish to a minimum immorality in the standing army’,<sup>156</sup> while some army officers also argued that army service would help create a ‘more perfect man and a better citizen.’<sup>157</sup> Political ideology was therefore clearly mobilised to support reserve reform.

It was within the context of these economic, strategic and ideological debates that the reform of the reserves was shaped. The Cardwell reforms – which began in 1868 with attempts to abolish the purchase of commissions – are best known for enshrining the regimental system into the army’s organisational structure through the implementation of the policies of localisation and pairing with reserve units. However, the reforms were wide in scope, with the 1870 Army Enlistment Act reducing the period of service from 21 years to twelve, with most men passing into the Army Reserve after six years of service. This act was vital, as not only did it cut the pension bill, it created a

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<sup>154</sup> Brazier, J. (2012) “All Sir Garnet!” Lord Wolseley and The British Army in the First World War’, *Military History Monthly*, May.

<sup>155</sup> French, *Military Identities*, 26.

<sup>156</sup> Ibid.

<sup>157</sup> French, *Military Identities*, 27.

system, on paper at least, by which the army could be expanded rapidly in times of crisis, while it was also hoped that shortening the terms of service would attract a better quality of recruit. Meanwhile, the Localisation Act of July 1872 and General Order 32 of 1873 created linked and localised line infantry regiments. Linking saw two-battalion infantry regiments become the norm, with one serving overseas and the other at home, while localisation divided the country into 66 sub-districts, each with its own pair of linked battalions and own permanent depot. This depot was to be shared with at least two local Militia battalions and any already existing local Volunteer battalions. The rationale behind these reforms was clear; recent evidence from the Prussian and Confederate armies suggested that locally-recruited battalions had better morale and discipline,<sup>158</sup> while in co-locating the headquarters of both regular and reserve units, Cardwell hoped that training in close proximity with regulars would increase the efficiency of the reserves whilst also encouraging them to join their full-time counterparts.<sup>159</sup> Similarly, Wolseley's visits to Confederate troops fighting in the American Civil War had convinced him of the need for more musketry and staff training.<sup>160</sup>

The drive for better integration of the reserves was complemented by other measures to increase state control over them and their efficiency. Lord Lieutenants' jurisdiction over the Volunteers was replaced by the Secretary of State for War's, and a proficiency certificate for Volunteer officers and NCOs was introduced. Volunteer adjutants were to be phased out and replaced by their regular counterparts and permanent staff instructors to boost capability.<sup>161</sup> This nascent attempt to professionalise the Volunteers was also evident in the introduction of a musketry bonus for soldiers

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<sup>158</sup> French, *Military Identities*, 15.

<sup>159</sup> Biddulph, R. (1904) *Lord Cardwell at the War Office: A History of His Administration 1868-1874*, London: John Murray, 173.

<sup>160</sup> Brazier, "All Sir Garnet!", 37.

<sup>161</sup> Beckett, *Riflemen Form*, 129-30; French, *Military Identities*, 15.

who met the increased standard, and in the amount of mandatory unit training required before Volunteer units could receive their increasingly important capitation grants from the government, upon which they relied for survival.<sup>162</sup>

While these reforms were well-intentioned, predictably they faced intense criticism from numerous stakeholder groups opposed to the changes. As French has shown, in terms of the wider army, the switch to short-service created an unforeseen recruitment and retention problem, with the number of soldiers needed per annum as a result of the introduction of short-service doubling by 1879.<sup>163</sup> This was complemented by a steep rise in deserters, the reduction in the quality of NCOs – who now had less experience – and an overage officer corps.<sup>164</sup> Meanwhile, the Volunteers mobilised to resist the steady incursion of the regulars into their domain. Volunteer Adjutants rejected the introduction of the proficiency cert as demeaning, and also clashed with the government over the pegging of the capitation grant to the two-thirds unit turnout required at parades.<sup>165</sup> Most vociferously, they attempted to reject their replacement by regulars, becoming ‘something of a pressure group in parliament’.<sup>166</sup>

Added to the recruiting problem and internal dissent, strategic imperatives heaped organisational pressures on the army and Cardwell’s plan for the reserves. The Ashanti, Zulu, Afghan, First Boer and Egyptian campaigns tested the linked battalion system to the limit, with home battalions essentially becoming feeder units for their sister battalions fighting abroad. As a result of overstretch, the cohesion-destroying practice of cross-posting soldiers between regiments – precisely what Cardwell’s linking had been designed to end – became common again. Meanwhile, it was also apparent that the transfer of former soldiers into the new Army Reserve could not match

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<sup>162</sup> Beckett, 129-30; French, *Military Identities*, 15; Walker, *Reserve Forces and The British Territorial Army*, 14.

<sup>163</sup> French, *Military Identities*, 16.

<sup>164</sup> Ibid, 18-19.

<sup>165</sup> Beckett, *Riflemen Form*, 130.

<sup>166</sup> Ibid, 131.

the need for soldiers to serve abroad because many of these campaigns could not be classed as the ‘grave national emergency’ required to mobilise them. Thus, by the late 1870s it was becoming clear that while Cardwell’s reforms had changed the army and reserves on paper, in reality it had not been as thorough a reformation as intended.<sup>167</sup> While localisation had been achieved, it had been at the expense of organisational balance and recruitment. These issues would need to be addressed by the next war minister, Hugh Childers.

The fact that Childers needed to undertake any reforms at all offers stark proof of the failure of Cardwell’s plans. Indeed, by 1881 criticism of Cardwell’s efforts had become so vociferous that a report by a committee of general officers recommended abandoning the system of linking entirely and replacing localisation – which hinged on a commitment to only post a soldier within his regiment – with a ‘general service’ contract.<sup>168</sup> However, crucially, most of the £3.5 million (about £310 million today) allocated by Cardwell to build the regimental depots had now been spent, and there was no way Childers could abandon such a costly programme. Faced with this economic and political reality, he continued it, pushing localisation further by amalgamating the linked battalions into new territorial regiments now named after the locality they recruited from. Militias made up these regiments’ third and fourth battalions, with Volunteer units also taking the new regiments’ territorial names. To address the recruitment and retention problem, Childers lengthened the terms of service to seven years and reduced Army Reserve liability to five, whilst also improving soldiers pay, promotion terms, and pensions. He also brought the Draconian discipline system more in line with Liberal principles.<sup>169</sup> The continued drive for efficiency and professionalism also affected the Volunteers, with further mandatory requirements for battalion drills in camp, the

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<sup>167</sup> Speirs, ‘The Late Victorian Army 1868 -1914’, 191-2; Walker, *Reserve Forces and The British Territorial Army*, 14-15.

<sup>168</sup> French, *Military Identities*, 20.

<sup>169</sup> *Ibid*, 21-24.

introduction of a voluntary exam for field officers and the introduction of uniform regulations, the latter of which especially prompted much agitation from officers over the expense incurred and ignorance of history the new uniforms represented.<sup>170</sup>

However, while Childers largely completed the process of army reform begun by Cardwell, his Militia and Volunteer reforms were less successful. Intensified linking and territorialisation did not improve relations between the regulars and their reserve counterparts in all units, mainly due to ongoing mutual professional suspicion; militiamen training at the Suffolk Regiment's depot before the Boer War were derided as 'half-soldiers' by their regular counterparts.<sup>171</sup> There was also strong Militia agitation against moving their headquarters to the new regimental depots, when they believed their headquarters were already local enough to sustain recruitment and identity.<sup>172</sup> The fact that Militia units also lost the ability to train their own recruits at the depots was another source of conflict. Moreover, class-related social divisions between the army and the Volunteers meant that the latter did not provide the steady flow of recruits into the army in the numbers that Cardwell and Childers had hoped localisation, territorialisation and subsequent integration would prompt. However, as French has shown, the Militia did join the army in significant numbers – about one third of recruits transferring annually between 1882 and 1907 – prompting him to conclude that the Cardwell/Childers reforms therefore benefitted the regulars more than they did the Militia.<sup>173</sup>

At least in this regard the reforms fulfilled their aims. The Volunteers, always more detached from the War Office due to their independent origins, lagged behind. The drive to reform the Volunteers had to continue under Lord Hartington's tenure in

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<sup>170</sup> Beckett, *Riflemen Form*, 134.

<sup>171</sup> French, *Military Identities*, 216.

<sup>172</sup> French, *Military Identities*, 204.

<sup>173</sup> French, *Military Identities*, 214.

the War Office, with the introduction of the breech-loading Martini-Henry rifle in 1885 and the inclusion of an improved musketry qualification in the criteria for the capitation grant. However, according to Beckett, it was Edward Stanhope who ‘did more to define a place for the Volunteers in national defence, and to develop Volunteer organisations accordingly, than any previous occupant of the War Office.’<sup>174</sup> Crucially, he integrated the Volunteers into the national mobilisation scheme, whilst placating Volunteer suspicions of overseas service by clearly stating that they would only be mobilised to resist an actual or apprehended invasion rather than a national emergency. Moreover, with agitation by Volunteers over the capitation grant and musketry qualifications rising, Stanhope established numerous committees to investigate where expenses could be saved by better management and relaxed the Volunteer musketry qualification somewhat.<sup>175</sup>

When seen in the context of the wider army reforms of this period, the changes in the Volunteers’ organisation and effectiveness appear to have been more incremental than those in the army, or even the Militia. This was mainly due to the distinctive institutional origins and collective understandings of the Volunteers as a separate and distinct – but still related – entity to the army and Militia, most obviously manifested in its members’ perception of the different function of their organisation; that of home defence. This position differed greatly from the actual functional requirements of a reserve organisation as defined by the state: that of a cheap method of quickly reinforcing the regular army in times of crisis. Indeed, it is possible to argue that this distinction between perceived function and required function of the army reserves resulted in a process of serial incrementalism rather than a single major transformational event during the Cardwell/Childers era. Similarly, although there was some increased

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<sup>174</sup> Beckett, *Riflemen Form*, 135.

<sup>175</sup> Beckett, *Riflemen Form*, 135-6.

co-operation,<sup>176</sup> it is clear that the full integration of the Volunteers and regulars envisaged by Cardwell failed to materialise, mainly due to the different organisational nature of the Volunteers.<sup>177</sup>

While Childers' reforms did conclude Cardwell's transformation of the army, crucially, the Militia – and to an even greater extent the Volunteers – lagged behind. For example, the Second Boer War of 1899-1902 raised serious questions about the effectiveness of the Militia, whilst highlighting disorganisation in the Yeomanry and the lack of seriousness in the ranks of the Volunteers.<sup>178</sup> Most worryingly, the failure of the reservists to back-fill the army in the numbers required due to the voluntary nature of their service overseas underscored that the reserves were not able to meet the functional demands placed on it by an army engaged in expeditionary warfare.<sup>179</sup> Ultimately, while the reforms did succeed in turning the Militia into a draft finding body for the army, the quality of recruit remained poor, and only 8.5 percent of Volunteers served overseas during the Boer War, a disappointing figure given the extent of patriotic feeling at the time. By the first decade of the twentieth century, with the threat of European war mounting, it was increasingly obvious that these shortcomings would need to be addressed. That task would fall to Richard Burdon Haldane.

### **Haldane and the Territorial Force**

Haldane's efforts to reform the army after the failures of the two previous Secretary of States for War, St John Brodrick and Hugh Arnold-Forster, have been very well documented.<sup>180</sup> An intriguing and controversial character, opinion is also split as to

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<sup>176</sup> Beckett, *Riflemen Form*, 216.

<sup>177</sup> Walker, *Reserve Forces and The British Territorial Army*, 15.

<sup>178</sup> Ibid.

<sup>179</sup> French, *Military Identities*, 28; Dennis P. (1987) *The Territorial Army 1907-1940*, Royal Historical Society: Suffolk, 8.

<sup>180</sup> For example: Spiers, *Haldane: An Army Reformer*, 4-7; Satre 'St John Brodrick and Army Reform 1901-1903'; Haldane, *Richard Burdon Haldane. An Autobiography*; Koss, *Lord Haldane*; Spiers, 'The Late Victorian Army 1868 -1914'; Higgens, 'How was Richard Haldane able to reform the British Army?'.

Haldane's legacy.<sup>181</sup> Despite this attention, few works examine in detail the impact of his reforms on the various British reserve forces. Given Europe's rising militarism, the strategic uncertainty of the early 1900s, and Britain's continued Indian commitment, it is perhaps surprising that, like Cardwell, Haldane undertook his reform of the Volunteers for primarily economic rather than strategic reasons. As Spiers has noted 'it was the economy and not [the strategic situation in] Europe that had been the *sine qua non* of Haldane's army reform.'<sup>182</sup> These reforms occurred in a context similar to Cardwell's, with increasing political attention focused on the cost and effectiveness of the army and the reserves after an expensive war had once more highlighted their inefficiencies. Indeed, such was the growing political demand for change in the wake of both the army's and the reserves' poor Boer War performance, that the Conservative war minister Arnold-Forster had attempted to reverse linking altogether and create larger depots to provide recruits for all regiments whilst at the same time cutting costs, in what could have been a predecessor of today's centralised super-garrisons. While Arnold-Forster's attempts to reform the army and the reserves failed due to large and sustained resistance in Parliament, and in particular from the Army Council,<sup>183</sup> his efforts did pave the way for Haldane's reforms, allowing the new Liberal Secretary of State for War to emphasise the continuity of his policies with those of the Tories. Decisively, Haldane cemented cross-party political support for his reforms by assuaging the Radicals' fear of militarism whilst highlighting to the Tories how much they would save the War Office as well.<sup>184</sup> This economic argument was crucial, as a recent Royal Commission to investigate constant over-expenditure on the army and the resulting

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<sup>181</sup> These works question Haldane's real impact: Fraser, P. (1973) *Lord Esher: A Political Biography*, London: Hart-Davis; Barnett, C. (1980) 'Radical Reform 1902-14' in Perlmutter, A. and Bennett, V. (eds) *The Political Influence of the Military: A Comparative Reader*, New Haven: Yale University Press. These assert it: Spiers, *Haldane: An Army Reformer*; Higgens, 'How was Richard Haldane able to reform the British Army?'.

<sup>182</sup> Spiers, *Haldane: An Army Reformer*, 73.

<sup>183</sup> Beckett, *Riflemen Form*, 236; Dennis, *The Territorial Army 1907-1940*, 4.

<sup>184</sup> Morris, A. (1971) 'Haldane's Army Reforms 1906-8: The Deception of the Radicals', *History*, 56(186).

Treasury-imposed cutbacks eloquently concluded that ‘extravagance controlled by stinginess is not likely to result in either economy or efficiency.’<sup>185</sup> Reducing the army by 20,000 men and decreasing the total number of active Militia, Volunteers and Yeomanry from 364,000 to 300,000 would allow this cycle to be broken, and the savings made could be re-invested into restructuring the Volunteers into a new, army-controlled Territorial Force (TF, renamed the Territorial Army in 1920).<sup>186</sup> This reform alone would reduce the reserves budget from over £4.4 million to £2.89 million per annum (the equivalent of a £140 million saving today),<sup>187</sup> and, for the first time in years, bring the entire army budget in below the £28 million (£2.6 billion today) ceiling allocated to it.<sup>188</sup> By stressing the substantial savings to be made, Haldane was also able to gain Liberal support whilst simultaneously outmanoeuvring opposition in the Army Council. Thus, once again, the reform of the reserves was undertaken for primarily economic reasons and was instigated by politicians rather than generals.

Yet, like the Cardwell reforms, Haldane’s economic arguments did not occur in a political vacuum, and the subsequent organic development of the TF was undertaken in propitious circumstances conducive to the fusion of economy with ideological argument. The Liberals had been elected in 1905 on the platform of ‘Peace, Retrenchment, and Reform’ and were thus ideologically predisposed to the radical reform of the army and reserves that was clearly needed after the Boer War. Haldane himself was heavily influenced by German philosophy, and his vision of a new ‘Hegelian army’ that reconciled the military need for defence with the political need for economy was the ideological cornerstone on which his reforms rested.<sup>189</sup> Supporting his

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<sup>185</sup> Speirs, ‘The Late Victorian Army 1868 -1914’, 197.

<sup>186</sup> Beckett, *Riflemen Form*, 235-8.

<sup>187</sup> Beckett, *Riflemen Form*, 249.

<sup>188</sup> Dennis, *The Territorial Army 1907-1940*, 8.

<sup>189</sup> Vincent, A. (2007) ‘German Philosophy and British Public Policy: Richard Burdon Haldane in Theory and Practice’, *Journal of the History of Ideas*, 68(1); Howard, M. (1967) *Lord Haldane and the Territorial Army*, London: Birkbeck College, 10, 15.

reforms, he declared that: ‘The basis of our whole military fabric must be the development of the idea of a real national army, formed by the people, and managed by specially organised local associations.’<sup>190</sup> Echoing Gladstone, Haldane even suggested that the new TF would ‘become a military school for the nation’, indicating his hope that a reinvigorated reserve would both attract much-needed recruits and have an important moral impact on society.<sup>191</sup>

Strategic arguments were also deployed to gain support for the reforms. The 1903 Nicholson Commission had concluded that the threat of invasion from the Continent had declined significantly and that a smaller reserve force was therefore required for home defence. However, reserve forces would need to more reliable and flexible to be capable of quickly reinforcing the army’s new ‘Expeditionary Force’, which it was increasingly foreseen, would serve on mainland Europe.<sup>192</sup> This, at least temporarily, resolved the ‘blue water’ versus the ‘bolt from the blue’ strategic debate over whether the British military should place emphasis on expeditionary warfare or home defence.<sup>193</sup> In adopting such a strategy, a striking force of three army Corps reinforced by elements of the TF was envisaged. Decisively, the consolidated TF was therefore to be the primary organisation by which the army could rapidly expand in times of need. By freeing the regulars of home defence duties and creating a decentralised TF administered on a local basis, Haldane hoped that he would create ‘a British version of a nation-in arms based on Voluntary service’ that would fulfil this role.<sup>194</sup>

In essence, Haldane’s reforms were based on the central desire to ensure the largest possible expeditionary army that could be provided for during peace, whilst

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<sup>190</sup> Spiers, E. (1980) *The Army and Society, 1815-1914*, London: Longman, 268.

<sup>191</sup> Beckett *Riflemen Form*, 236; Dennis, *The Territorial Army 1907-1940*, 11; Speirs, ‘The Late Victorian Army 1868 -1914’, 206.

<sup>192</sup> Beckett, *Riflemen Form*, 232-3.

<sup>193</sup> Dennis, *The Territorial Army 1907-1940*, 5.

<sup>194</sup> Speirs, ‘The Late Victorian Army 1868 -1914’, 206.

simultaneously re-organising the reserves into a single force that could reinforce the army when deployed overseas. Thus, he planned a regular Expeditionary Force 100,000 strong. This would be complemented by a Territorial Force of 300,000 incorporating the Militia, Yeomanry and Volunteers,<sup>195</sup> organised into 42 infantry brigades, 14 cavalry brigades and supported by full logistics elements.<sup>196</sup> The new TF would be more closely controlled by the War Office, which stipulated that service contracts would be regularised at four years; annual military camps would last 15 days; all members were now subject to full military law; and that the army would be responsible for overseeing all TF training and assessing their readiness. To provide better oversight, new, predominantly civilian and elected Territorial County Associations would be established across the country, responsible for raising and administering their local units, but under the central direction of the War Office. Crucially Haldane's intended to create a reserve force that, following six months' training after initial mobilisation, would be ready to deploy overseas with the British Expeditionary Force.<sup>197</sup> Essentially, he was attempting to professionalise the reserves and create a two-tier military readiness force structure that once again would balance demands for economy with the need for strategic flexibility.

However, while his reforms had widespread backing in Parliament, Haldane was to meet heavy resistance from the reserve organisations themselves. Firstly, the Militia representatives' intransigence when given the choice of integration with the regular army or joining the new TF led to the failure to reach any agreement and resulted in Haldane abolishing the Militia altogether. Instead, he created a small Special Reserve to keep a flow of draftees willing to serve in the army in time of war.<sup>198</sup> While the Militia's disbandment and replacement simply formalised the reality of its function,

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<sup>195</sup> Speirs, 'The Late Victorian Army 1868 -1914', 211.

<sup>196</sup> Beckett, *Riflemen Form*, 248.

<sup>197</sup> Beckett, *Riflemen Form*, 248.

<sup>198</sup> Dennis, *The Territorial Army 1907-1940*, 12; Speirs, 'The Late Victorian Army 1868 -1914', 210-11.

Volunteer and Yeomanry resistance to the erosion of their autonomy by the new County Associations also caused Haldane to rethink parts of this policy. Faced with increasing opposition from commanding officers, he was forced to drastically reduce the elected membership of the Associations, effectively ceding control of the bodies to the Territorials themselves and undermining a central tenet of his policy. Thus, as Dennis has noted, for ‘the price of minimising Volunteer intransigence, a key element of Haldane’s concept of the National Army was sacrificed before the Territorials were even born.’<sup>199</sup> Worse was to follow.

Haldane had announced in Parliament that the TF would serve overseas in support of the regulars. But when he introduced the Territorial and Forces Act eight days later on 19 June 1907, this decisive clause had been dropped. The reason behind this omission from the Act was twofold. Firstly, the Volunteers and their ‘trade union in the House of Commons’<sup>200</sup> had strenuously objected to the introduction of the overseas obligation and Haldane needed their support in order to man the TF. Given their opposition, Haldane risked a recruiting crisis if he did not allay their fear of overseas service. In bending to their demand to drop stipulated overseas service, he instead hoped that their voluntary ethos would see between a sixth and a quarter of the TF volunteer for service with the army abroad if need be.<sup>201</sup> Secondly, as Dennis has noted, the change was also aimed at placating the more radical critics of his reforms who saw the very creation of an Expeditionary Force itself as disturbing.<sup>202</sup> Introducing the Act, Haldane thus changed tactics, stating that the role of the Territorials was primarily home defence. This was at odds with the whole thrust of his reforms to date which had been to create the Expeditionary Force and a reserve to support it. Thus, with strong organisational resistance threatening to undo his plans, for political expediency Haldane

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<sup>199</sup> Dennis, *The Territorial Army 1907-1940*, 13.

<sup>200</sup> Arnold-Forster quoted in Beckett, *Riflemen Form*, 250.

<sup>201</sup> Speirs, *Haldane: Army Reformer*, 108-113.

<sup>202</sup> Dennis, *The Territorial Army 1907-1940*, 14.

sacrificed the most vital tenet of his reforms to ensure his new organisation was not still-born. His last minute climb-down would have far-reaching implications for the TF's organisational development and performance over the next century, creating confusion as to what the exact function of the TF was and when it could and should be used. This was as much a result of the institutional realities of the organisation and different stakeholder positions as it was Haldane's unwillingness to see his policies flounder. But the lack of clarity represented the start of a difficult and continuing juxtaposition within the TF between the state's functional need for operational flexibility and the reserves' institutional need to recruit.

In the end, the Act passed through Parliament with little resistance, and the creation of the Territorials on 1 April 1908 was strongly supported by the King and the Lord Lieutenants who were to chair the newly-formed County Associations. But it was clear that Haldane's reforms had been decisively weakened. One historian has said of Haldane that: 'He spoke and wrote in his memoirs as though he created a New Army. All that he had done was to rechristen the Volunteers.'<sup>203</sup> This is a little unfair, as Haldane had created the BEF (albeit not the means to reinforce it) and the new TF did offer a more streamlined organisational framework that was now far stronger in terms of its supporting services and equipment. However, after an initial rise in recruitment following Haldane's Act, the TF still failed to meet its targets, with numbers decreasing to 268,000 by June 1909.<sup>204</sup> By September 1913 this had dropped to 236,000 actives,<sup>205</sup> about 60,000 short of establishment, while only one third of the force had achieved its musketry qualifications and just seven percent had signed up for overseas service.<sup>206</sup> By that time, 80 percent of the force were not re-engaging after their four years' service, and although better pairing between regular and TF units was evident, cultural divisions

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<sup>203</sup> Wilkinson, S. (1933) *Thirty Five Years: 1874-1909*, London: Constable, 368.

<sup>204</sup> Beckett, *Territorials*, 37-38.

<sup>205</sup> Speirs, 'The Late Victorian Army 1868 -1914', 211.

<sup>206</sup> Beckett, *Territorials*, 39-40; French, *Military Identities*, 222.

remained acute, with French arguing that the ‘regulars remained almost as reluctant to accept Haldane’s new creation as their equals as they had the Volunteers.’<sup>207</sup> This was especially evident in the exclusion of Territorials and old Volunteers from the regular’s regimental clubs, indicating the limits of integration and pairing even within the wider regimental family. As such, Haldane’s ‘frankly militaristic’<sup>208</sup> Hegelian vision of a nation-in-arms never fully materialised.

### The First World War

The following years saw much debate arise from the confusion over the Territorials’ primary role. Such was the malaise within the TF and the complicated statutory position of its members in relation to overseas service that by the outbreak of the First World War seven years later the organisation was effectively by-passed in the national mobilisation plan. While the new Secretary of State for War, Field Marshall Kitchener, somewhat cruelly articulated his distrust of the TF as a ‘town’s clerk army’,<sup>209</sup> the failure of the Associations to draft expansion plans and the need for a home defence force added to the TF’s perceived weakness. As a result, in 1914 Kitchener did not attempt to mobilise the Territorials along Haldane’s two-tier plan, instead offering volunteers from the TF the chance to serve with their units if initially 80 percent (later 60 percent) of their unit’s establishment signed the Imperial Service Obligation (ISO) to serve overseas.<sup>210</sup> Given the wave of patriotism at the time, many Territorial units entered the regular army whole scale in this way, and by February 1915 there were already 48 Territorial infantry battalions in Flanders. The small numbers of units that had taken the ISO prior to war were immediately ordered to replace regulars on colonial duties, again indicating their lower status and their perceived lack of combat readiness. Importantly, after May 1915 – when larger formations of TF units were deployed

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<sup>207</sup> French, *Military Identities*, 227.

<sup>208</sup> Howard, *Lord Haldane and the Territorial Army*, 92.

<sup>209</sup> Dennis, *The Territorial Army 1907-1940*, 53.

<sup>210</sup> Beckett, *Territorials*, 53.

overseas – they lost the suffix ‘Territorial’, indicating their assimilation into the regulars. By the time voluntary enlistment ended and direct recruiting into the Territorials was suspended in December 1915, over 725,000 men had joined its ranks over the previous eighteen months; almost half of all those recruited to Kitchener’s New Army.<sup>211</sup>

Given the need for mass mobilisation to replace the casualties on the Western Front, the Territorials, like the Militia before them, had essentially become a drafting body for the army. It is important to stress here that this occurred by a process of assimilation, not integration; the Territorials were simply subsumed into the regular army. As units came up to strength with volunteers they were designated first line units. At this point those who had not taken the ISO would revert to the second line units being filled by new recruits, and by November 1914 when the first line units began to deploy, a third line unit would be established. This system eventually provided 318 battalions and 23 infantry divisions of ‘Territorials’ for service overseas,<sup>212</sup> with the performance of these units widely praised, especially after they had adapted to field conditions. Such was the importance of the volunteer Territorial units in the early stages of the war that Field Marshall John French later stated: ‘Without the assistance that the Territorials afforded between October, 1914 and June, 1915, it would have been impossible to hold the line in France and Belgium.’<sup>213</sup> Indeed, the sombre statistic that the Territorials took over 577,000 casualties in all theatres of the war highlights their centrality to Britain’s war effort, representing over a quarter of the army’s 2,365,000 dead and wounded.<sup>214</sup> Ironically, when the Territorials were re-established in 1922, it was to be the shared sacrifices and the hard-won recognition of their fighting

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<sup>211</sup> Ibid, 58.

<sup>212</sup> Beckett, *Territorials*, 57.

<sup>213</sup> Dennis, *The Territorial Army 1907-1940*, 34.

<sup>214</sup> Beckett, *Territorials*, 76; The War Office (1922) *Statistics of the Military Effort of the British Empire During the Great War 1914–1920*, London: HMSO, 237.

capabilities that increased their integration with the army more than Haldane's reforms ever had.<sup>215</sup> It is therefore clear that the model of Territorial mobilisation during the war did not follow Haldane's vision, which had been crucially undermined by the exclusion of the overseas pledge. Indeed, the resort to using the TF as a draft finding and training body rather than a ready-to deploy reserve provides stark evidence that Haldane's reforms did not succeed in the one decisive area that they were designed to. Allison's and Kaufmann's organisational arguments offer a strong explanation for why Haldane's transformation ultimately fell short, but the evidence from this period also highlights that reforming the army's reserve forces had historically taken longer and proved more difficult than in regular forces. Moreover, the impetus for reforming the reserves again arose from the fusion of economic, strategic and politico-ideological goals.

### **The Second World War**

Following their strong performance in the First World War, the Territorials had both earned the respect of the regular army and found themselves better integrated with them due to the shared trials of combat. However, the dire economic situation in Britain soon led to decreased defence spending, epitomised in the Geddes cuts of 1922. The newly-renamed TA, still suffering from an ill-defined role due to the national 'ten year rule' defence strategy and a continued reluctance to accept a peacetime overseas pledge, found themselves bearing the brunt of these cuts. Throughout the inter-war years efforts to introduce an overseas service liability for the TA were rebutted by hostile County Associations who still resented the way the Territorials had been by-passed during the war. Under-recruitment remained a chronic problem, the nadir coming in 1932 when the TA was only 128,000 strong out of an establishment of 216,000, while technological advances left its equipment obsolete. Meanwhile, oscillations in Britain's defence posture between appeasement and a continental strategy saw the TA's function switch

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<sup>215</sup> French, *Military Identities*, 230.

from air defence to second-tier reinforcement and back to air defence, with the Territorials wavering between being at the periphery and the core of defence planning. As so often the case with the reserves, it was only the looming European war and a rising sense of national emergency that eventually defined a role for the TA and saw its numbers swell, especially after the 1938 Munich crisis caused the government to double the Territorial's establishment. When war came, the Armed Forces Act of September 1939 suspended Territorial service for the duration, resulting in the assimilation of the TA into the army in a similar way to that which occurred in September 1914. The manner in which the reserves were assimilated into the regular army demonstrated once again that in times of national emergency the government could not afford the luxury of allowing the reserve army to serve only at home. However, the same was true of the TA itself and the citizens who now flocked to join its colours; both saw issues over the 'pledge' as unimportant when compared to national survival. As had been the case in 1859-60 when the French invasion scare saw the Volunteers created, it was the perception of strategic threat which saw recruitment into the TA rise dramatically in the late 1930s. But such a fusion of public support with the political will to fund the reserve was relatively rare outside of wartime conditions; it was only the threat of major conflict that saw the Territorials designated a role, properly invested in, and fully manned. And once this had happened, the TA was simply subsumed into the army again anyway.

Nevertheless, there remained clear evidence of disdain for the TA in the regulars, embodied by a lack of promotion of TA officers and a distrust of the quality of training Territorial units had received. This was hardly their fault. The rapid expansion of the TA from 1938 onwards had once again left it lacking NCOs to train the force, and this expansion rested on the assumption that Territorial divisions would have at least eight months collective training before they were deployed. Under increasing threat

from Germany, this later changed to six months, and in the event, three Territorial divisions arrived in France in early 1940 after only four months training. Indeed, eight of the 13 BEF divisions deployed in 1940 were originally Territorial formations, and three of these – the 12<sup>th</sup>, 23<sup>rd</sup> and 46<sup>th</sup> Divisions, who had been tasked with rear security and lacked supporting arms and services – were thrown into the line in the retreat to Dunkirk. Some units in these formations had only one week's training, while others had never fired some of their weapons, many of which lacked ammunition. The 12<sup>th</sup> and 23<sup>rd</sup> divisions took very heavy casualties and were ultimately destroyed, but not before winning respect from the regulars and Germans alike for their tenacity. Nevertheless, the very heavy losses suffered by TA divisions in the defeat in France led to the break-up of most of those formations that did escape to Britain.

The debacle in France prompted a re-organisation of the surviving army, including a re-appraisal of how best to use the TA. Beginning during the First World War, the continuing rapid mechanisation of the combat arms in the inter-war period had precipitated a steep decline in the ratio of combat troops to support and logistics troops. Simultaneously, the dominance of infantry amongst the combat arms had also dropped from 53 percent to 31 percent, as mechanisation brought with it an increasing desire for armour, artillery and other mechanised support forces. These shifts in required force structure meant that many TA infantry units had to re-role. While this usually happened at the battalion level – with units re-training as armoured, parachute, signals or artillery specialists – it also occurred at the divisional level, with the 52<sup>nd</sup> Division assigned as mountain warfare experts. Similarly, the logistics arms were also forced to rationalise to meet the demands of increasingly mechanised warfare. For example, in August 1942, the Royal Electrical and Mechanical Engineers were formed to rationalise vehicle repair, for which the Royal Engineers, Royal Army Ordnance Corps, and Royal Army Service Corps had all been responsible. As would be expected, advances in technology

therefore shaped the strategic and tactical environment which shaped reserve organisation.

A policy of bolstering TA units with regulars was also introduced for both the combat and logistics arms. Thus, most original TA divisions had one regular combat battalion per brigade, while regular divisions also usually had one to three TA combat battalions per division. Support and logistics arms could be drawn from both regular and TA in both divisions, and cross-posting was also common. The net result was that, when not used as piecemeal infantry units against armour, as in France, the assimilated Territorial units performed reasonably well at the Second Battle of El-Alamein, in Tunisia, during the Normandy battles, and the following Western European campaign. This was especially the case if they had been exposed to combat incrementally. For the most part, the policy of combining Territorial and regular units in larger formations appears to have boosted combat and logistics performance, while cross-posting also meant that the distinction between a former TA soldier and a regular was lessened. This continued after the war, as National Service saw a constant rotation of ex-servicemen through the Territorials as part of their obligation, and the deployment of some volunteers to Libya and Aden. But for the main the TA reverted to its home defence role, and when the phasing out of National Service was announced in 1957, accompanied by the changed strategic priorities of the nuclear age and the uncertainties of the British economy, the Territorials again found themselves increasingly the target for reform.

### **Carver-Hackett Cuts Deep**

The origins of the reforms undertaken by General John Hackett and Major General Michael Carver are to be found in the 1964 ascension to power of a Labour government committed to putting Britain's 'defences on a sound basis and to ensure the nation gets

value for money.<sup>216</sup> Slow GDP growth and the devaluation of the pound forced the new government to seek economies. Moreover, the Labour Party had been elected on the promise of more funding for social programmes without seeking more taxation, and, as the Liberals before them, they viewed defence as an area where savings could be made. The cost of maintaining a nuclear deterrent, contributing to NATO and maintaining significant military capacity overseas was argued to be overbearing, and while the withdrawal from east of Suez would provide some savings, it was in this context that an earlier Defence Review report had concluded the cost of the TA could not be justified.<sup>217</sup> Similarly, the strategic rationale for a reduction of the Territorials was also made by reference to the new nuclear environment and the prevailing NATO ‘short war’ scenario, both of which, it was argued, rendered a large home defence force redundant.

The subsequent 1965 Defence Review was traumatic for the Territorials. The reforms it envisaged were based on Carver’s assumption that the sole function of the TA was to provide a means by which the regular army could expand in wartime, and that it was failing in this role.<sup>218</sup> As a result, he proposed a slashing of the annual Territorial budget from £38 million to £20 million (£380 million today) and a re-orientation away from combat arms to support services. Crucially, the reforms were heavily focused on logistics. Almost half of TA units were designated support formations, whilst a 1,500 strong force of high readiness logisticians complemented by an expanded force of 11,000 to provide support for the strategic reserve.<sup>219</sup> However, the expansion of reserve logistics capability was offset by severe reductions in TA

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<sup>216</sup> French, *Military Identities*, 200.

<sup>217</sup> HM Government, (1965) *Sir Philip Allen’s Home Defence Review Committee Report*, London: HMSO.

<sup>218</sup> HM Government, *Home Defence Review Committee report*.

<sup>219</sup> Beckett, *Territorials*, 201.

manpower, with its established strength cut from 200,000 to 64,000.<sup>220</sup> Much of these fell on the teeth arms. A total of 73 infantry battalions, 41 artillery regiments and 19 armoured regiments – effectively meaning the end of the Yeomanry – were cut, leaving only 13 infantry battalions, four artillery regiments and a single armoured regiment.<sup>221</sup> Moreover, of the 59 County Associations, only 14 would remain, in a deep blow to those organisations that had administered the TA since its inception. With one fell chop, the system instituted by Haldane's reforms had been all but eliminated.

Not surprisingly, the proposed reforms faced considerable opposition, most notably from the Council of Territorial Associations which had not been consulted by Hackett prior to the 1965 White Paper and also, it emerged, which had had their proposal of a cyclical limited liability for teeth arm units rejected out of hand. Although there was no statutory requirement for the Councils to be informed, such was the army's desire to push through the TA reforms that Hackett remarked 'there is an erroneous impression to the extent to which the scheme is open to discussion'.<sup>222</sup> With Carver likewise warning that there would be 'no climate of change' around the reforms, negotiations between the Council and the Ministry of Defence quickly broke down. Meanwhile, the Conservatives, rallying to protect 'one of sacred cows of the Tory establishment',<sup>223</sup> were defeated in a parliamentary no-confidence vote on the reforms by a single vote. Such resistance did result in some concessions from the army and the Labour government; an extra 28,000 light infantry being authorised before the Reserve Forces Act came into effect in 1967. The Act also reorganised the TA and Special Reserve into a four-tier Territorial Army and Volunteer Reserve force held at different

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<sup>220</sup> Walker, *Reserve Forces and The British Territorial Army*, 20; Stanhope, H. (1979) *The Soldiers: An Anatomy of the British Army*, London: Hamish Hamilton, 250, has the same figure. Beckett provides the number 107,000 to 57,000 without citation; this may represent actual trained strength rather than total establishment.

<sup>221</sup> Beckett, *Territorials*, 201.

<sup>222</sup> Beckett, *Territorials*, 202.

<sup>223</sup> Ibid, 203; Stanhope, *Soldiers*, 251.

levels of readiness and liability; this was essentially a consolidation of previous arrangements. But even with this consolation and the consolidation, the Carver-Hackett reforms drastically weakened the TA and left its members and those on the surviving County Associations deeply suspicious of the top echelons of the army, whom they felt had betrayed them in order to save the regulars from the worst of the cuts.<sup>224</sup>

Once again, it is clear that primarily economic arguments were fused with those of ideology and strategy in the decision to undertake the reforms. However, what is interesting about the Carver-Hackett reforms is that they were comparatively successful at instigating organisational transformation. What allowed transformation to be driven through to its conclusion was the personal determination of Carver and Hackett to instigate the reforms, and, most importantly, the political support of the government which was conducive to their and the MoD's unwillingness to negotiate with the Council. Although resistance from stakeholders was forthcoming, in comparison to Cardwell's and Haldane's more consensual approach, the 1967 reforms were to a large degree presented as a *fait accompli* by the army's elites and simply pushed through from the top down, with only one minor modification. However, such an approach not only caused long-lasting distrust between the TA and the regular army, it also saw the first time that reform of the TA became highly politicised, with the breakdown of cross-bench support for the reforms evident in the Conservatives' reaction. The army's lack of consultation with the Council was a major cause of this, but the Carver-Hackett reforms were important in that from now on the revival or reduction of the TA would become increasingly politicised along party lines. Indeed, it is noteworthy that all the previous periods of major reform were undertaken by Liberal governments; as one Tory aide has stated: 'The Conservative Party has liked the TA for two reasons: it fosters the

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<sup>224</sup> Walker, *Reserve Forces and The British Territorial Army*, 21.

volunteer ethic and it is very cost-effective.<sup>225</sup> As such, when the Conservatives returned to government in 1970 it was no surprise they quickly increased the Territorials establishment by 10,000, even though the force remained chronically underinvested and under-recruited.

The TA did experience a revival under Margaret Thatcher's government following the publication of the Shapland report in 1982, with numbers expanded to 86,000 on paper. The force also enjoyed an increase in investment under Thatcher and a more clearly defined role: that of the rear defence of NATO areas of operation on the Continent. As a result, the Territorials averaged 89 percent of established strength between 1979-89, but the 25-30 percent annual soldier wastage rate remained a major problem.<sup>226</sup> Nevertheless, there were major concerns within the army about the TA's ability to meet this more defined role.<sup>227</sup> One senior army officer involved in planning FR20 noted that the structural reforms of the Carver-Hackett era only began to come to fruition in 1984 when the TA successfully took part in Exercise Lionheart in Germany. This was the proof of concept exercise for their rear-defence role, but, importantly, this officer stated that 'it only took 20-odd years!'<sup>228</sup> With cashing-in on the peace dividend a priority in the 1990 'Options For Change' programme, the TA escaped fairly lightly, with a reduction to 63,500 somewhat offset by its inability to reach its full establishment anyway. Moreover, chronic neglect by the army remained a major problem, and structural problems due to the reduced size of both the army and the TA were not addressed. The 1996 Reserve Forces Act, amongst other measures, changed the call-out terms for reservists so that the Secretary of State for Defence, not Parliament, could mobilise reservists if need be. However, this once again highlighted the political question of when the reserves should be used, especially given the intensification of

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<sup>225</sup> Walker, *Reserve Forces and The British Territorial Army*, 51.

<sup>226</sup> Beckett, *Territorials*, 212.

<sup>227</sup> Bennest in Walker, *Reserve Forces and The British Territorial Army*, 76.

<sup>228</sup> Interview, Major General Dickie Davis, 27 February 2015.

army operations abroad after Tony Blair became Prime Minister in 1997. Since that date, the TA continuously contributed 10-12 percent of the UK's total mission force in both Iraq and Afghanistan, but these forces were predominantly deployed as individuals to backfill regular units, rather than as formed units. Moreover, apart from the invasion of Iraq in 2003, during this period the Territorials were generally reliant on individuals to volunteer for service rather than compelling them to do so. This policy was known as 'intelligent mobilisation' but it severely limited the ability to deploy formed TA units overseas, an indication that Haldane's last minute exclusion was still curtailing the utility of the organisation a century later.

## **Conclusion**

What do these past periods of reserve reform tell us about these processes, and the army's reserve in general? Firstly, it is clear that attempts to reform the reserve are cyclical in that they occur in response to changed economic and strategic circumstances which provide the impetus for another cycle of reform. These primarily financial impetuses for reforming the reserves have been supported by the politico-ideology of those undertaking the reforms. Secondly, it is also clear that throughout their history the army's reserve forces have come under sustained pressure to reform after poor performance in wars, and that reform is often, but not exclusively, attempted simultaneously with that of the army. Thirdly, the sources of reform have also been primarily located in the political rather than the military sphere, and where the army has been keen to implement reserve transformation, this has often been in the context of the struggle for organisational survival epitomised in reductions in military spending. Finally, as I have shown, apart from times of national emergency, the reserves have historically struggled to recruit to full strength. As Peter-Caddick Adams has noted

'Whatever the manpower establishment, the Territorials seem to hover at 10 per cent below.'<sup>229</sup>

However, in terms of informing the central question of this study, the most important conclusion to be drawn from this chapter concerns the impact of the previous periods of reform, and in particular the time it took to effect organisational change within the reserves during each era. Throughout, stakeholder resistance and organisational friction within the army, the reserves and Parliament – most frequently caused by recruitment issues and potential deployment overseas – have consistently limited the impact of reforms. This fact highlights how these two issues are fundamental to understanding today's Army Reserve and attempts to transform it. Indeed, it is clear that delays to transformation are inherently bound up in the organisational nature of a part-time force. Almost every period of reform has taken years to implement, much longer than originally intended. As one TA Colonel has remarked: 'There is nothing in the TA you can immediately... it takes five to ten years [to make changes]'.<sup>230</sup> And when these changes have finally been implemented their impact has been generally more limited than originally envisaged; each reform has been adjusted due to political and organisational resistance. Indeed, most reforms have failed in their primary focus of making the army's reserve more operationally deployable. Thus, it appears that the part-time, volunteer and citizen nature of the reserves inherently limits transformations when compared with the regular army. British reserve forces at least, have always been slower and more difficult to reform, and much of this has been related to their organisational resistance to be deployed overseas *en masse*. Drawing on this evidence, I would contend that in general, reserve transformations take longer to effect than those of regular forces due to the distinct character of their organisations. Indeed, it is possible to argue that the

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<sup>229</sup> Caddick-Adams, P. (2002) 'The Volunteers', in Alexandrou, A., Bartle, R. and Holmes R. (eds) *New People Strategies for the British Armed Forces*, London: Frank Cass, 95.

<sup>230</sup> Walker, *Reserve Forces and The British Territorial Army*, 21.

fundamental nature of Britain's army reserve has changed little over the past 150 years. Yet, as this chapter has shown, while the economic, ideological and strategic questions underpinning the Haldane, Cardwell-Childers, Carver-Hackett reforms – and the FR20 transformation discussed in the next chapter – are remarkably constant, their organisational outcomes were more a product of their own historical contexts than the similarities between these questions would suggest. While the rationale for reforming the reserves may often bear semblance to previous attempts, how transformation actually occurs is firmly based in current organisational realities. The questions may be the same, but the solutions are different.

Over its history, it appears that the reserves have changed by numerous processes identified in the military transformation literature outlined in Chapter One. While Cardwell's emulative attempt at organisational reform represented a top-down process of change in both the army and the reserves, it was severely hampered by stakeholder resistance, organisational friction and the changing strategic imperatives of a withdrawal from the colonies. The subsequent Childers reforms represented an attempt to relieve the organisational pressures of recruitment and retention that resulted from Cardwell's restructuring and the changed strategic circumstances. Following Allison, both Cardwell and Childers provided the personal drive needed for change, the reserves in particular evolved as much by the process of incremental adaption – itself caused by the friction associated with the struggle for organisational survival – as they did by top-down direction. The experience of the Territorials in the First World War also suggests that it was adaption to battlefield realities in the field that honed the TF's skills and allowed better integration with the army, rather than the reform process that Haldane had instigated. Meanwhile, the ultimate trajectory of Haldane's reforms were shaped by both the external pressures of economy, strategy and ideology, but most importantly, by the internal need to recruit the Territorials. Indeed, it was this functional

requirement and the debates that resulted from it that ultimately shaped the development of the Territorials during this period. The Carver-Hackett reforms were noteworthy for the manner in which transformation was imposed upon the TA without cross-party political consensus, and driven through by an army keen to protect its own organisation. The general's unwillingness to compromise caused wider political fallout, including lasting distrust between the reserves and the army. This has not been helped by the latters' neglect of the reserves during peacetime, and then assimilation of them during wartime.

## Chapter Four

### ‘A Finger in the Wind Thing’: FR20 and the Struggle for Organisational Survival

In the last chapter I discussed how economic, strategic and politico-ideological factors have cyclically provided the impetus for past periods of reserve reform, and how these attempts to transform the reserves were heavily curtailed by organisational friction and resistance. I also argued that the sources of reserve reform have usually been primarily political rather than military. Here, I want to build on those arguments by examining how the current FR20 transformation originated and how it was implemented. Following Allison, in this chapter I focus on how and why the most recent debate over the position of the TA in British defence was influenced by the desire for economies in defence, strategic uncertainty, and most importantly, by various political and military stakeholders. Contrasting Edmunds et al.’s view that ‘the most important long-term driver for change [in the reserves was] strategic in nature’, I argue that the intensely political origins of FR20, and the army’s resistance to the policy, are of critical importance to understanding the evolution and implementation of FR20.<sup>231</sup> Building on this analysis, the chapter then charts how these origins, coupled with other organisational frictions and personal tensions, have caused FR20 to be tested and adjusted at each step of its development and implementation, resulting in important revisions to the policy. Ultimately, I argue that these political origins and the army’s resistance to them, meant the policy was ad hoc, thereby lacking coherence and causing organisational issues which had not been foreseen.

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<sup>231</sup> Edmunds, T. et al., ‘Reserve forces and the transformation of British military organisation’, 120.

## The Context of FR20

As Strachan has said, the purpose of history is not simply to tell us what is similar to the past, but also what is different. With this in mind, three major contextual differences between the previous periods of reserve reform and that of the current period should be stressed: the impact of the global recession on British defence spending; the strategic uncertainty of the 21<sup>st</sup> Century; and the post-Fordist principles discussed in the next chapter that Western militaries have unselfconsciously utilised to adapt to these pressures. In terms of the impact of economics on FR20, Paul Cornish and Andrew Dorman have examined how the economic climate and tight financial constraints of the Spending Review heavily shaped both the National Security Strategy (NSS) and the SDSR, which were all released within days of each other in October 2010. Taken together, these policy documents began the process of the whole-scale reform of Britain's armed forces – and of the British Army in particular under the Army2020 plan – just as these forces began to return from over a decade of operations in Iraq and Afghanistan.<sup>232</sup> Crucially, Cornish and Dorman show that the economic climate in which the reviews were conducted dictated that, in a globalised world, financial security was seen as the fundamental presumption on which the SDSR rested.<sup>233</sup> Put simply, without economic stability it was seen as impossible for the nation to fund its own defence and security. Economic rationale was deployed to support the need for reform to such an extent that the military came to accept that large cuts were inevitable, with the Chief of the Defence Staff (CDS), Jock Stirrup, admitting that ‘the financial security of the nation must be the primary consideration of any review.’<sup>234</sup> Of course, as Cornish and Dorman have argued, this contention remains open to question given the ability of

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<sup>232</sup> Cornish, P. and Dorman, A. (2013) ‘Fifty shades of purple? A risk-sharing approach to the 2015 Strategic Defence and Security Review’, *International Affairs*, 89(5); Cornish and Dorman, ‘Dr. Fox and the Philosopher’s Stone: the alchemy of national defence in the age of austerity’.

<sup>233</sup> Cornish and Dorman, ‘Dr. Fox...’, 347.

<sup>234</sup> *The Daily Telegraph* (23 November 2010) ‘Forces Chief says defence cuts “an acceptable risk”’.

nations to access international lending facilities.<sup>235</sup> They argue convincingly that in reality the SDSR was ‘politics-led’, and representative of the Conservatives ideological views on sound economy which were hidden behind arguments for the need for austerity.<sup>236</sup> Senior officers responsible for implementing the subsequent defence cuts indicate that they too were aware at the time that despite the rhetoric, the cuts were ‘a political choice.’<sup>237</sup> Meanwhile, the fact that both the NSS and SDSR were undertaken simultaneously with the 2010 Spending Review, completed in only five months, and then had to be re-adjusted for the subsequent Review in 2011 caused some to label the SDSR ‘a treasury-led defence review’.<sup>238</sup> It also indicated the rushed and ad hoc nature of policy formulation at the time which resulted in a lack of coherence. The evidence presented below on FR20 supports this analysis. Indeed, the impact of the government’s determination to reduce the defence budget on the adoption and implementation of FR20 cannot be overstated. It provided the central rationale behind the narrative for transforming the reserves. Nevertheless, the relatively unique economic context was also complemented by strategic and organisational factors.

The argument can be made that the strategic situation in the 21<sup>st</sup> Century is qualitatively and quantitatively different to any other period in history due the impact of globalisation and the spread of communications technology.<sup>239</sup> Numerous sociologists have argued that we are now in a period of ‘late modernity’ that is fundamentally different to the classical modern period of the Cardwell and Haldane reforms.<sup>240</sup> Despite excellent critique of the ‘global village myth’ that underpins much of the strategic

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<sup>235</sup> *The Guardian* (26 July 2012) ‘George Osborne: no U-turn on deficit reduction plan’.

<sup>236</sup> Cornish and Dorman, ‘Dr. Fox...’, 346.

<sup>237</sup> Interviews Major General Kevin Abraham, 14 January 2015 and Major General Dickie Davis, 27 February 2015.

<sup>238</sup> Cornish and Dorman, ‘Fifty shades of purple?’ 1183.

<sup>239</sup> Giddens, *The Consequences of Modernity*; Held, D. et al. (1999). *Global Transformations* Cambridge: Polity Press.

<sup>240</sup> Giddens, *The Consequences of Modernity*; Bauman, Z. (2006) *Liquid Times: Living in an Age of Uncertainty*, Cambridge: Polity.

implications of this change,<sup>241</sup> it is clear that strategic uncertainty and the flexibility of military forces required to cope with globalisation remain key assumptions of British defence policy.<sup>242</sup> It is also clear that the range of tasks being assigned to the military since the end of the Cold War has increased vastly, with conventional war fighting duties; peace support operations; counter-insurgency; capacity-building abroad; anti-terrorist/ aid to the civil power at home all key tasks for the British Army. While there are of course always strategic uncertainties – the debate over the ‘blue water’ strategy in Haldane’s time is just one example of this – for the first time it is the multitude of possible threats and tasks that provides another supporting rationale for the current transformation. Similarly, the impact of the wars in Iraq and Afghanistan, especially in terms of public adversity to long term interventions and distrust of political ‘spin’ remain important historical differentiators. While there is some continuity with the strategic contexts of the past, FR20 has been therefore influenced by different strategic problems to its forebears.

Perhaps most importantly, the post-Fordist approach discussed in detail in Chapter Four underpins the rationale of FR20, with its desire for smaller (and cheaper), more professional and adaptable ‘periphery’ reserve forces to complement the ‘core’ professional army. This re-organisation of militaries is a novel historical phenomenon, and it has been shown to have positive impacts on the combat effectiveness and performance of those militaries who have adopted it.<sup>243</sup> As a result, the modern – and crucially, professional – post-Fordist military is qualitatively and quantitatively different from its 19<sup>th</sup> and 20<sup>th</sup> Century predecessors. Indeed, it is post-Fordist logistics principles, with their supply chain management approach to force structure and the outsourcing of logistics functions to the reserves that have provided the army with a

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<sup>241</sup> Porter, P. (2015) *The Global Village Myth*, London: Hurst.

<sup>242</sup> HM Government, *The Strategic Defence and Security Review*.

<sup>243</sup> King, *The Transformation of Europe’s Armed Forces*; King, *The Combat Soldier*.

blueprint for releasing some of the dual organisational pressures of declining British defence spending and increasing strategic uncertainty. In the British Army's view, this post-Fordist-based transformation has adopted 'a new and imaginative and original structure that is designed to meet the challenges of the 2020 era.'<sup>244</sup> Clearly then, there appears to be something historically and organisationally unique about the unselfconscious utilisation of post-Fordist principles to deliver British military capability.

## **Background to FR20**

The recent history of FR20 begins with the 1990 Options for Change defence review that reduced the TA's establishment from 76,000 to 63,500.<sup>245</sup> While this reduction masked an inability to recruit to full establishment (the TA's total strength was apparently 72,500 at this time),<sup>246</sup> it created structural problems within the TA and also failed to define a collective role in terms of supporting the regular army on operations. According to one British general, during this period the TA suffered 'a massive decline... the age profile increased and man training days were reduced due to underinvestment.' Similarly, the lack of a collective role meant that the 'system of individual backfills was introduced which would last for the next 20 years.'<sup>247</sup> The 1998 Security and Defence Review reduced the TA again, from an establishment of 59,500 to 41,200. Meanwhile, the increased operational tempo experienced under Blair's premiership highlighted differences in the quality of training of TA soldiers compared with regulars, especially in critical areas such as battlefield medicine and shooting.<sup>248</sup> Underinvestment also left the TA short of kit and personal equipment. Crucially, these

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<sup>244</sup> General Nick Carter in House of Commons Library Report 'Army2020', 26 July 2012, 6, available at <http://researchbriefings.files.parliament.uk/documents/SN06396/SN06396.pdf>, retrieved 28 July 2016.

<sup>245</sup> Beckett, *Territorials*, 215 gives 74,000 but *The Independent Commission*, 14, states 76,000.

<sup>246</sup> *Future Reserves 2020*, 12.

<sup>247</sup> Interview, Major General Dickie Davis, 27 February 2015.

<sup>248</sup> *The Daily Telegraph* (22 October 2004) '2,000 TA soldiers in Iraq failed gun tests', available at <http://www.telegraph.co.uk/news/worldnews/middleeast/iraq/1474816/2000-TA-soldiers-in-Iraq-failed-gun-tests.html>, retrieved 28 July 2016.

failures were highlighted in coroners' reports investigating the deaths of TA soldiers in Iraq, and their conclusions reiterated that the TA and the army had a legal duty to ensure that soldiers were as well trained and equipped as possible.<sup>249</sup> In terms of the future deployment of the TA, these reports meant that the 'legal implications [of deploying insufficiently trained and equipped reservists] were huge.'<sup>250</sup> This re-stated obligation to reservists, and the media attention on equipment failures that accompanied it, would provide some of the impetus for subsequent transformation of the reserves. However, it would also undermine FR20's ability to deliver one of its central aims.

The army began to address these shortcomings in the TA in 2004, but the wider structural and functional issues took a low priority with both organisations heavily committed in Iraq and Afghanistan, in which 25,000 reservists served – and 31 died – in total.<sup>251</sup> The deployment of 7,000 TA personnel to the initial stages of the 2003 Iraq War quickly resulted in a recruitment crisis, with 6,000 personnel reportedly retiring between 2004 and 2005 alone. This left the TA at its lowest manning level since its foundation and reiterated the paradox that deploying the TA to conflicts other than national emergencies often resulted in signoffs and lower recruitment that threatened the organisation's future.<sup>252</sup> As a result of the poor state of the TA, by late 2008 the CGS, General Sir Richard Dannatt, had ordered the army to conduct full scale review of the TA. This review proposed three potential courses of action that would reduce the TA's strength to between 24,000 to 8,000.<sup>253</sup> However, it planned that this smaller force would be much more deployable, with reservists 'required to go on a tour of duty at

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<sup>249</sup> BBC News, (30 January 2007), 'New inquest sought for TA soldier', available at [http://news.bbc.co.uk/1/hi/programmes/file\\_on\\_4/6311593.stm](http://news.bbc.co.uk/1/hi/programmes/file_on_4/6311593.stm), retrieved 28 July 2016.

<sup>250</sup> Interview, General Sir Peter Wall, 14 January 2015. Henceforth Wall.

<sup>251</sup> Interview, Major General Dickie Davis, 27 February 2015. Henceforth Davis.

<sup>252</sup> The Daily Telegraph (13 July 2008), 'Territorial Army soldiers to be ordered to fight in Iraq and Afghanistan', available at <http://www.telegraph.co.uk/news/newstopics/onthe前线/2403661/Territorial-Army-soldiers-to-be-ordered-to-fight-in-Iraq-and-Afghanistan.html>, retrieved 28 July.

<sup>253</sup> The Daily Telegraph (28 September 2008) 'Territorial Army faces deep cuts', available at <http://www.telegraph.co.uk/news/uknews/defence/8028204/Territorial-Army-faces-deep-cuts.html>, retrieved 28 July 2016.

least once every six years', and with those refusing to do so potentially being asked to leave.<sup>254</sup> It is important to stress here that this was an internal army plan that only considered the TA, not the air and naval reserves, nor had it been discussed as part of a wider inter-departmental debate within the MoD on British defence that was beginning ahead of the forthcoming SDSR.<sup>255</sup> As a result, according to another former CGS, 'all work stopped on the army's reserve plan in 2009' when it became clear that the MoD, facing tighter fiscal constraints ahead of the SDSR, was considering alternate plans. Therefore, although it was still active in Afghanistan and recruited to a trained strength of 19,000, 'as an organisation [the TA] was in stasis, wondering what was going to happen next.'<sup>256</sup>

By October 2009, Dannatt had been replaced as CGS by General David Richards, and with the impact of the 2008 financial crisis now fully reverberating through government, the MoD temporarily suspended TA training in an attempt to save £20 million.<sup>257</sup> Meanwhile, senior officers in the TA were increasingly worried that the army intended to shrink their organisation to such a degree that its only role would be to surge medical capability on future operations. Indeed, they viewed the halting of TA training as evidence that the army's high command was ready to let the reserves degrade to a point that it would be easier to justify reducing its size and budget.<sup>258</sup> Crucially, this perception of a deliberate army policy to neglect the reserves to the point where it could then be transformed – but on the army's terms – had traction with the TA's political supporters in Parliament. Indeed, the importance of ending the neglect of the reserves as a rallying point in arguments for reserve transformation is difficult to overstate. At this

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<sup>254</sup> *The Daily Telegraph*, 'Territorial Army soldiers to be ordered to fight in Iraq and Afghanistan'.

<sup>255</sup> Interview, General Sir Graeme Lamb, 13 July 2015. Henceforth Lamb.

<sup>256</sup> Interview, Wall, 14 January 2015.

<sup>257</sup> *The Daily Mail* (10 October 2009) 'Territorial Army ordered to halt training as pressure mounts on budgets', available at <http://www.dailymail.co.uk/news/article-1219422/Territorial-Army-ordered-halt-training-pressure-mounts-budgets.html> retrieved 28 July 2016.

<sup>258</sup> Personal communication with former regular officer involved in Army2020 planning, 9 September 2015.

point, it was becoming apparent that the future of the reserves would be decided more by the external financial situation – and an increasingly vocal and politicised TA lobby – than by the army's own plans for the organisation.

### **Policy Exchange Paves the Way?**

The watershed for FR20 came in September 2010 when the centre-right Policy Exchange think-tank released a report designed to inform the rushed SDSR process underway at the time. The report, *Upgrading Our Armed Forces*, was authored by two retired officers, former 22 SAS commander Lieutenant Colonel Richard Williams, and former Director Special Forces, Lieutenant General Graeme Lamb. Although it covered a broad spectrum of innovative recommendations for British defence, it also contained a specific section on the reserves. Williams and Lamb suggested that the current MoD position on the reserves was ‘disconnected from the requirements of any logical National Security Strategy’ and had taken ‘little account of their utility relative to cost’ in providing a number of capabilities, including homeland security and the ‘development of a more unified British society.’<sup>259</sup> They also stated that the MoD seemed ‘to be a reluctant user of its reserve forces’, and, crucially, by drawing comparisons with the US National Guard and the Israeli reserves, they challenged the policy of using TA soldiers to backfill the regulars on operations, rather than deploying them as formed combat-capable units.<sup>260</sup> The report controversially argued that the role of the TA should be expanded to relieve the army of its heavy, conventional combat capability by doubling the size of the TA to 60,000. This would allow the army to be cut from ‘100,000 to around 75,000.’<sup>261</sup> The report also deployed economic arguments. Noting that a reserve soldier cost just one quarter to one fifth of their regular

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<sup>259</sup> Williams, R. and Lamb, General Sir G. (2010) *Upgrading Our Armed Forces*, London: Policy Exchange, 47-8, available at

<http://www.policyexchange.org.uk/images/publications/upgrading%20our%20armed%20forces%20-%20sep%202010.pdf> retrieved 22 August 2016.

<sup>260</sup> Ibid, 48.

<sup>261</sup> Ibid, 51.

counterparts and that the TA contributed only 26 percent of the regular and reserve force – compared with 53 percent in the US and over 40 percent in Australia and Canada<sup>262</sup> – Williams and Lamb called for a ‘significant mind-set shift within the senior leadership of the military’ and a ‘strategic shift in the way that reservist and regular manpower is managed’ in order to reinvigorate and re-orientate the reserves to face the demands expected in the forthcoming NSS.<sup>263</sup> They concluded that with investment the UK’s reserves could fulfil a wide range of roles, including homeland defence, conventional warfare and stabilisation operations.

Although the February 2010 Green Paper on defence had briefly mentioned the aim of greater integration with the reserves, in the words of Lamb: ‘Policy Exchange started the whole [FR20] thing.’<sup>264</sup> Certainly, it provided a coherent argument around which proponents of reserve transformation could coalesce. But in fact there is evidence that the political momentum to examine the reserve issue was growing before then. On 21 July 2010, the Commons’ Defence Select Committee questioned the Secretary of State for Defence, Liam Fox, on issues related to the SDSR. During this session, Committee member and Conservative back-bencher Julian Brazier quizzed Fox and senior MoD civil servants over whether the cost effectiveness of the reserves was being considered in the review process.<sup>265</sup> Having served with the reserve special forces unit 21 SAS, Brazier has deep and extensive knowledge of the Army Reserve and has been a passionately strong advocate of the organisation in Parliament for over 25 years.<sup>266</sup> After the session, the Committee expressed disappointment that the MoD had failed to

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<sup>262</sup> Ibid, 48, 51.

<sup>263</sup> Williams and Lamb, *Upgrading Our Armed Forces*, 53.

<sup>264</sup> *Future Reserves 2020*, 6; Interview, Lamb, 13 July 2015.

<sup>265</sup> House of Commons Defence Committee (September 2010) *First Report, The Strategic Defence and Security Review*, London: TSO, oral evidence questions 26-28, available at <http://www.publications.parliament.uk/pa/cm201011/cmselect/cmdfence/345/345.pdf>, retrieved 28 July 2016.

<sup>266</sup> Walker, *Reserve Forces and The British Territorial Army*, 55.

conduct a specific study on developing the reserve role as part of the SDSR, noting especially the lack of cost/benefit analyses:

‘The MoD failed to provide comparative costings. This is unsatisfactory, and reveals the MoD’s failure to address seriously the option of placing capabilities into the Reserve Forces at much lower cost, as the Americans have done. We recommend that the increased use of Reservists should be properly covered by the National Security Council (NSC) in its discussions.’<sup>267</sup>

Clearly, in the austerity context, the reduced cost of reservists was seen as a central reason for re-examining their position in Britain’s armed forces.

The first of the NSC meetings to decide the tone and detail of the SDSR was to be chaired by then Prime Minister David Cameron on 28 September. Perhaps with this timeframe in mind, many of Williams’ and Lamb’s recommendations were initially published in an editorial in the centre-right newspaper *The Times* on 15 September 2010.<sup>268</sup> Both men also appeared before the Defence Select Committee the same day.<sup>269</sup> Clearly, at least some of the Committee was already predisposed to their arguments. This appearance was followed a day later by another *Times* article that seized on the reserve issue in particular, with Williams stressing the TA’s ‘pay-as-you-go capability’.<sup>270</sup> Only a day later, *The Times*’ Whitehall sources reported ‘very, very strong tensions developing’ in the MoD between some ministers and the army on the reserves issue.<sup>271</sup> By the 28 September both *The Daily Telegraph* and *The Guardian* were reporting how the Policy Exchange document was causing significant friction in government over the future of the TA, just as Williams appeared on BBC Radio to

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<sup>267</sup> House of Commons Defence Committee *First Report, The Strategic Defence and Security Review*, 16.

<sup>268</sup> *The Times* (15 September 2010) ‘Only hi-tech forces can win wars of the future’, available at <http://www.thetimes.co.uk/tto/opinion/columnists/article2727860.ece>, retrieved 28 July 2016.

<sup>269</sup> *The Times* (16 September 2010) ‘Fighting force of the future needs twice as many part-timers, say ex SAS chiefs’, available at <http://www.thetimes.co.uk/tto/news/uk/defence/article2728117.ece> retrieved 28 July 2016.

<sup>270</sup> *The Times*, ‘Only hi-tech forces can win wars of the future’.

<sup>271</sup> *The Times*, ‘Fighting force of the future needs twice as many part-timers, say ex SAS chiefs’.

further publicise his proposals.<sup>272</sup> While the Policy Exchange report was in fact released two days later, it was already clear that the reserves issue had found a wider audience.

Although FR20 went on to receive wide cross-party support when it was unveiled, it is important to situate the political origins of FR20 within sections of the Conservative Party here. Policy Exchange, founded by MP Francis Maude in 2002, is widely regarded as one of the most influential think-tanks on the political right in Britain. It has close ties to David Cameron, and is funded by donations from some of the biggest donors to the Conservative Party.<sup>273</sup> At the time, Cameron was in the early days of his premiership in the coalition with the Liberal Democrats, an alliance that had left him open to criticism from the right of his party who, amongst other grievances such as Britain's membership of the European Union (EU), were reluctant to accept major defence cuts. Similarly, Cameron's relationship with defence secretary Fox was fraught as the latter had contested the 2005 Conservative leadership election against him. Fox remained a senior figure on the party's hard right with considerable backbench support, and had also clashed with Cameron on numerous defence issues in the past.<sup>274</sup> He was also being lobbied by pro-reserve Conservative MPs at this time.<sup>275</sup> In September 2010, the threat of an alliance of Fox and some disgruntled backbenchers landing a political blow to Cameron over the defence cuts was very real, especially as

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<sup>272</sup> *The Daily Telegraph* 'Territorial Army faces deep cuts'; *The Guardian* (28 September 2010) 'Territorial Army in sights of defence review', available at <http://www.theguardian.com/uk/2010/sep/28/territorial-army-sights-defence-review>, retrieved 28 July 2016.

<sup>273</sup> See [http://powerbase.info/index.php/Policy\\_Exchange#Funding\\_and\\_finances](http://powerbase.info/index.php/Policy_Exchange#Funding_and_finances) retrieved 12 August 2015.

<sup>274</sup> *The Financial Times* (29 September 2010) 'On manoeuvres: Fox vs Cameron', available at <http://www.ft.com/intl/cms/s/0/96cdf096-cbfd-11df-bd28-00144feab49a.html#axzz3hTk96U1s>, retrieved 28 July 2016.

<sup>275</sup> *The Guardian* 'Territorial Army in sights of defence review'.

he could not give ground on a referendum on remaining in the EU due Liberal Democrat leader Nick Clegg's refusal to do so.<sup>276</sup>

It is within this context that William and Lamb's findings were quickly backed by Tory backbenchers Brazier and David Davis, both champions of the TA in Parliament who had regularly rallied against its neglect.<sup>277</sup> According to Brazier, it was 'hard to overestimate the degree of neglect of the TA' at this time.<sup>278</sup> Interestingly, Davis also served in 21 SAS. As former members of the regiment, Brazier and Davis could be expected to have known Williams through the Special Force's Club network. Both MPs distrusted the regular army's motives due to its recent chronic underinvestment in, and plans to cut, the TA.<sup>279</sup> They also had the support of other prominent Tory backbenchers, including Bob Stewart, Julian Lewis and John Baron, and up to 15 others, many of whom would subsequently become 'Brexiters'. Similarly, inside the TA, this lobby could draw on the support of one of Britain's richest men, the Duke of Westminster, the recently deceased Major General Gerald Grosvenor; Major General John Crackett; Brigadier Ranald Munro; and Brigadier Sam Evans; all prominent senior TA officers very anxious about its organisational survival if entrusted to the army.<sup>280</sup> According to one regular general, these were 'quite independent people, not short of going off on their own political tack... they want[ed] to be a part of the army and part of a separate political axis, and it was a very powerful political axis.'<sup>281</sup> Of course, in senior army officers' views such lobbying dangerously blurred the political and military spheres. But to politicians, this was exactly how one generated support for policies. And politicians and senior reserve officers would maintain that the

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<sup>276</sup> *The Financial Times* (24 June 2016) 'Brexit: Cameron and Osborne are to blame for this sorry pass', article by Nick Clegg.

<sup>277</sup> *The Times* (18 September 2010) 'MPs back bigger role for Territorial Army', available at <http://www.thetimes.co.uk/tto/news/uk/defence/article2731349.ece>, retrieved 28 July 2016

<sup>278</sup> Interview, Julian Brazier MP, 21 June 2016. Henceforth Brazier.

<sup>279</sup> Interview, Davis, 27 February 2015.

<sup>280</sup> Interview 18.

<sup>281</sup> Interview, Wall, 14 January 2015.

army's leadership was also playing politics by attempting to cut the reserves down to a size that would make it practically useless, without consulting either the TA or the MoD.<sup>282</sup> Indeed, the lingering existence of different views of each stakeholder groups' political motivations indicates how deeply suspicious they came to be of each other.

While it is not clear if Brazier and Davis – nor Policy Exchange – specifically asked Williams to address the reserves issue (Lamb appears to have come on board at Williams' request and did not have any contact with Brazier beforehand; for his part Brazier says he only met Williams and Lamb as their report was readied for circulation)<sup>283</sup> the report was certainly not drafted in a political vacuum. Similarly, there is evidence that Brazier had been floating some of the recommendations of the report with TA units before it was published.<sup>284</sup> Either way, in calling for the exact opposite of Dannatt's review – a doubling of TA strength rather than halving it – it ensured that the reserves debate remained highly contested. It is also clear that with the SDSR approaching, and austerity pervasive, the future of the army reserve in particular was becoming increasingly politicised. Indeed, a day before David Cameron first met with the NSC to discuss the SDSR and the reserves issue within it, the Shadow Defence Secretary Bob Ainsworth criticised the process as dogged by 'spin, squabbles and speculations'.<sup>285</sup> Another Whitehall source commented: 'The TA is unfinished business – they should have been restructured and cut before now, but a lot of them are well-connected and eloquent and they're very good at lobbying.'<sup>286</sup> This, of course, does not make it unique *per se*; as I have shown previous periods of reserve transformation usually had political origins, but these political origins are important for understanding

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<sup>282</sup> Interview, Army Reserve officer, 14 April 2016.

<sup>283</sup> Interviews, Lamb, 13 July 2015, Brazier 21 June 2016.

<sup>284</sup> Personal communication, Army Reserve officer, 20 April 2016.

<sup>285</sup> 'Territorial Army in sights of defence review'.

<sup>286</sup> *The Times* (17 September 2010) 'Battle brews in Whitehall as Tory MPs push to increase the Territorial Army', available at <http://www.thetimes.co.uk/tto/news/uk/defence/article2731109.ece>, retrieved 28 July 2016.

the subsequent evolution of FR20, and crucially, its impact on reserve logistics sub-units.

The Williams and Lamb report, and the heavy media coverage it received, was important because it pushed the reserves issue into the spotlight ahead of the SDSR. However, the evidence and chronology of events suggests that it was pushing against an already open door. The reserves element of Williams' and Lamb's proposals appears to have been crafted, at least in part, in response to the Dannatt review and the threat this posed to the TA's organisational survival. Williams and Lamb drew attention to 'a tendency within the MoD to cut/limit their [the reserves'] numbers or starve them of resources as a way of funding investment in the standing forces.'<sup>287</sup> This rebuttal was clearly based on the recent historical neglect of the reserves, but it can also be viewed as an attempt to undermine the Dannatt review. Indeed, Richards, who succeeded Dannatt as CGS in August 2009, has spoken of a 'classic inter-service battle' in the run up to SDSR, as 'each service defended [their] respective turfs.'<sup>288</sup> When Richards was promoted to CDS in October 2010, his successor as CGS, General Sir Peter Wall, had a similar view of the regular-reserve issue as a 'zero-sum game' of organisational survival in which either the army or the TA would be worse off.<sup>289</sup> This group of regular officers wanted to retain the army's 'core' conventional capabilities and viewed the reserves issue as a distraction that was 'not as important as perceived'.<sup>290</sup> As Wall elucidated on this shared position:

'If you're the CGS, you're more worried about the bits of the army that give you your fighting power... the reserve is a very important part of the army and very important part of the army's contact with the nation, but it is only ever

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<sup>287</sup> *Upgrading Our Armed Forces*, 47.

<sup>288</sup> Richards, General D. (2014) *Taking Command*, London: Headline, 295; 297.

<sup>289</sup> Interview, Wall, 3 August 2015.

<sup>290</sup> *The Times* 'Battle brews in Whitehall as Tory MPs push to increase the Territorial Army'; Dannatt comments at Global Strategy Forum, 14 July 2015, available at <http://www.globalstrategyforum.org/wp-content/uploads/THE-STRATEGIC-DEFENCE-AND-SECURITY-REVIEW-2015-TOUGH-CHOICES-FOR-TOUGH-TIMES-WILL-WE-GET-IT-RIGHT.pdf>, 15, retrieved 23 August 2016.

going to be topping up what the core spine of the army is doing, which is going to be the regular piece.<sup>291</sup>

Moreover, Wall's emphasis on the core provides an indication of the unselfconscious influence of post-Fordist thought on military planners in the current era.

Against this view, Williams and Lamb drew on their special forces experience to outline how British defence, and in particular the army, should adapt to strategic uncertainty and austerity by outsourcing its conventional capability to the TA whilst simultaneously relying on the cheaper reserves to provide non-conventional capabilities. One recommendation that would remain central to the reserve's transformation was the call for the deployment of reserve forces in formed units. The inclusion of this suggestion is particularly indicative as Brazier had visited TA units prior to its publication to lobby for formed reserve units, sometimes meeting resistance from the units themselves.<sup>292</sup> Moreover, the emphasis on the need for a change in mind-set from an 'industrial age into an information age' way of thinking on defence 'at the top' of the military leadership indicates that Williams and Lamb were aware that senior generals' strategic and organisational vision for the army, and hence for the reserves, contrasted their own.<sup>293</sup> They therefore linked the reserve issue with a vision for British defence in general and the army in particular that differed markedly from Dannatt's, Richards' and Wall's focus on the core. But in emphasising periphery forces' ability to react to strategic uncertainty, their underlying rationale was also to reject the regular army's exclusive ownership of core capabilities. While the themes that academics have identified as post-Fordist principles were therefore accepted and used to justify both sides' arguments, a wide chasm was opening as to the exact balance between the core-periphery divide in reality. This was complimented by disagreements over the nature of

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<sup>291</sup> Interview, Wall, 14 January 2015.

<sup>292</sup> Interview, Army Reserve officer, 20 April 2016.

<sup>293</sup> *The Times*, 'Only hi-tech forces can win wars of the future'.

strategic threats facing Britain that was underpinned by both the army's and the TA's struggle for organisational survival.

Interestingly, in the weeks prior to the publication of the SDSR, David Cameron also personally intervened to stop the army from cutting the TA. Media reports at the time stressed Cameron's commitment to his 'Big Society' policy as a central reason for this,<sup>294</sup> and in a subsequent keynote speech to businesses Cameron did explicitly link Big Society and the TA.<sup>295</sup> At this time, further opinion pieces in *The Times* cautioned against cutting the TA, highlighting the role of some elements of the media in particular in shaping and driving the reserves agenda.<sup>296</sup> When the SDSR was published on 19 October 2010, it was obvious that Cameron's late intervention, combined with the Policy Exchange document, agitation on the Tory backbenches, the Defence Select Committee's criticism, the TA lobby and media coverage, had all had an impact. The SDSR committed the government to putting defence 'on a sound and sustainable footing' and outlined wide cuts to, and reform of, the armed forces.<sup>297</sup> This included a restructuring of the military – and especially the army – around a new 'Future Force 2020' (FF20) model, which, as the next chapter details, followed supply chain management (SCM) principles with its higher and lower readiness, rotational force structure. Decisively, the SDSR also stated that: 'there is a strong case for reviewing whether our reserve forces are properly structured for the type of conflict we envisage

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<sup>294</sup> *The Times* (10 October 2010) 'Prime Minister appeals to military chiefs not to cut Territorial Army', available at <http://www.thetimes.co.uk/tto/news/politics/article2761544.ece>; *The Sunday Times* (21 November 2010) 'Cameron rejects army's plans to halve Territorial Army', available at [http://www.thesundaytimes.co.uk/sto/news/uk\\_news/article456424.ece](http://www.thesundaytimes.co.uk/sto/news/uk_news/article456424.ece), both retrieved 28 July 2016.

<sup>295</sup> Cameron, D. (2010) 'Business in the Community' speech, 2 December, available at <https://www.gov.uk/government/speeches/business-in-the-community-speech> retrieved 12 August 2015.

<sup>296</sup> *The Times* (11 October 2010) 'Vital Territory', available at <http://www.thetimes.co.uk/tto/opinion/leaders/article2761260.ece>; *The Times* (27 October 2010) 'The vision for the new Territorials must be radical', available at <http://www.thetimes.co.uk/tto/life/courtsocial/article3580928.ece>, both retrieved 28 July 2016.

<sup>297</sup> HM Government, *The Strategic Defence and Security Review*, 15.

undertaking in future... We will therefore undertake a six month study into the future role and structure of the Reserves.<sup>298</sup>

The political impetus for the inclusion of a reserves review is supported by Lamb's assessment that: 'the Policy Exchange pressure from Parliament and bank benchers were the reasons why the Prime Minister then looked at actions that were taking place within... the army which looked like it had greater implications than the army... and therefore said "we should have a review."<sup>299</sup> Similarly, according to Wall, who was on the other side of the reserve argument, the 'reserve thing [was] politically imposed... Cameron had to give ground to some parts of the Tory back bench and the reserves was a way of doing it... Essentially it was a political fait accompli and we just had to get on with it.'<sup>300</sup> Other senior officers and a former defence minister have confirmed the origin of FR20 in the political, rather than the military, sphere.<sup>301</sup> These fundamentally political origins are crucial to understanding the issues with FR20's subsequent implementation. The political nature of the programme not only created tensions between Conservative back benchers and ministers, and between government politicians and the army, but also between senior officers in the TA and the regulars. These frictions would impact FR20 at almost every step in its development. But perhaps more significantly, like the Cardwell-Childers and Haldane reforms before it, FR20's political origins would also create dissonance between the vision for, and the reality of, its organisational outcomes.

### **An Independent Commission?**

A day after the SDSR was published, David Cameron addressed Parliament on its content and announced that an independent commission would be established to

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<sup>298</sup> Ibid.

<sup>299</sup> Personal communication, Lamb, 1 June 2015.

<sup>300</sup> Interview, Wall, 14 January 2015.

<sup>301</sup> Interview, Davis, 27 February 2015.

investigate the reserves. Lamb has since adroitly outlined both the hurried and seemingly ad hoc origins of policy at this time:

‘So... then I got a call, literally in my garden, from... [Edward Llewelyn] the Prime Minister’s Chief of Staff, who said: “Hey General, you’re the only name that’s come out of the hat who we’d trust to play this straight. But we’re going to put a commission up, General [Nick] Houghton is going to be the serving [member], Julian Brazier is going to be the MP, and I’d like you to be in, and the Prime Minister is walking across to Parliament, will you do it?”’<sup>302</sup>

The quote is particularly interesting as it demonstrates the degree to which the reserves issue had been politicised even by this early stage: not only was the Prime Minister’s Chief of Staff directly involved in recruiting a member of an independent commission, he was also indicating the need to ‘play it straight.’ This desire is an acknowledgement of deep tensions between senior army officers on the one hand and politicians and senior TA officers on the other. Lamb responded in the affirmative, and has since elucidated on his participation:

‘Was I a harsh driven advocate? Not at all. But I was watching what was happening and therefore the pressures on the budget for them to say we need to reduce the reserves down to what, in my view, would have been probably a level at which it was incapable of surviving. It would have been Dad’s Army on Dad’s Army. It would have just fallen apart at one point in time... We had something that could therefore bring order when chaos or disorder was effected. I still believe the reserve have an important part to play in that...’<sup>303</sup>

Nevertheless, the inclusion of Brazier, the reserves most passionate and prominent political lobbyist and a key advocate of deploying reserve units;<sup>304</sup> Lamb, whose views countered those at the top of the army; and Houghton, who was in the running for the politically-appointed position of CDS; does raise some questions as to the impartiality and independence of the Commission. Certainly, Wall’s position is that the review came under political pressure, with the reserves lobby ‘banging this drum... in a sense coercing Nick Houghton’s Commission to agree bigger numbers... [and] if we’re really honest, slightly to political appetite, slightly to political order, [Houghton] said: “yeah

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<sup>302</sup> Personal communication, Lamb, 1 June 2015.

<sup>303</sup> Personal communication, Lamb, 1 June 2015.

<sup>304</sup> Personal communication, Army Reserve officer, 28 April 2016.

they'll get to 30,000 fine, it's a tiny proportion of the national workforce'''.<sup>305</sup> As I will show in the concluding chapter, this reasoning was flawed.

The Commission examined the state of British reserve forces and, importantly, investigated how they were used in Australia, Canada and the US. When it reported back to Parliament in July 2011 the Commission noted that the UK's reserves were in 'severe decline' and, in comparison with these nations, formed too small a part of national military capability. It blamed the policy of individual backfilling on operations for accelerating the reserves institutional deterioration. Stressing the security and organisational benefits reservists could provide, the Commission found that the reserve role had not been extended to match the 'new security environment' outlined in the NSS, including homeland security and resilience, nor the adaptable force structure outlined in the SDSR. Crucially, it also placed the argument for investment in the reserves within the emerging 'Whole Force Concept' that had been instigated by the MoD's Defence Reform Review of June 2011. Central to this inclusion was the financial argument 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.'<sup>306</sup> The Commission concluded that the reserves were not being exploited for their talent and ability to provide 'a cost-effective manpower balance across the Armed Forces.' Similarly, the reserves themselves were not being used in a cost-effective manner and needed rationalisation.<sup>307</sup> The report also highlighted the societal benefits of reserve service as a bond between the armed forces and citizens. In seeking to strengthen its argument in this regard, the Commission drew attention to the fact that with 'the Government's [newly launched] 'Big Society' initiative giving prominence to the need for citizens to volunteer, the Reserve Forces

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<sup>305</sup> Interview, Wall, 14 January 2015.

<sup>306</sup> *The Independent Commission*, 11.

<sup>307</sup> *Ibid*, 6.

also have an opportunity to provide an outlet for newly engaged volunteers.<sup>308</sup> As such, the Commission deployed security, economic, and politico-ideological normative arguments in making the case for reserve reform. The interest in other Western reserve forces also highlighted both the desire to emulate successful reserve forces – especially in terms of deploying formed reserves units – that Farrell has identified. Indeed, the experience of other reserve forces provided both a strong rationale and a clear structural solution that heavily influenced FR20; FR20 was in part an emulative transformation by design.

Houghton's Commission recommended a number of major changes to the roles and structure of the reserves, and in particular the TA which made up the vast majority of reservists. It identified 'a range of specialist skills in areas such as Cyber, Medical, Intelligence, Police, Linguistics and Stabilisation' where reservists should be given specific roles, and sought £590 million over four years to fund the expansion of the reserves to a trained strength of 35,000. Of this number, the Commission confidently suggested that the TA should expand from 19,000 to 30,000 by 2015.<sup>309</sup> In particular, it stressed the need to: '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.'<sup>310</sup> While the deployment of the TA in formed sub-units on more permissive operations was endorsed, in fact this was a small but important revision of Policy Exchange's call for formed reserve units (for example battalions rather than companies) to be deployed on combat operations. Other important structural recommendations included the pairing of regular and reserve units and the integration of the TA into the army's FF20 force structure. These were to be accompanied by better employer and family liaison, while it identified that changes to legislation to allow

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<sup>308</sup> *Ibid*, 10.

<sup>309</sup> *The Independent Commission*, 30.

<sup>310</sup> *Ibid*, 26.

reservists to be mobilised more routinely and to protect them from dismissal from their civilian employment when this was done were needed.<sup>311</sup> Overall, the Commission therefore recommended a package of welfare and employment reforms designed to reinvigorate the TA. These had not been included in Williams' and Lamb's proposals.

### **Paired Fates: Army and Future Reserves 2020**

July 2011 marked a key moment in the development of FR20. Faced with a 7.8 percent reduction in its budget, in May 2011 the MoD began conducting a three-month internal review on how these new fiscal targets would impact the SDSR's FF20 model. In early July it concluded that the SDSR 'was not an affordable proposition' in light of the reduced defence budget and that the army would need to be reduced in size from 102,000 to 82,000.<sup>312</sup> The MoD projected that this further reduction would help the army to save £5.3 billion over the ten years from 2012-13 to 2021-22.<sup>313</sup> Meanwhile, on 3 July the Independent Commission released its report on the reserves. Events now began to move quickly. With reports of much political friction over the exact extent of the cuts to the MoD between Cameron, his Chancellor George Osborne, and Fox,<sup>314</sup> and 'considerable disquiet' amongst senior officers (however, reports that Wall threatened to resign are inaccurate), at a Cabinet meeting on 15 July the decision was made to reduce and re-organise the army and re-invest in the reserves.<sup>315</sup> This decision was heavily influenced by the almost simultaneous conclusion of the 'three month exercise' and the Independent Commission. Indeed, given the political friction over the extent of

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<sup>311</sup> Ibid, 7.

<sup>312</sup> Interviews, Wall, 14 January 2015; Davis, 27 February 2015.

<sup>313</sup> National Audit Office (2014) *Report on Army2020: Executive Summary*, 5, London: HMSO, available at <https://www.nao.org.uk/wp-content/uploads/2014/06/Army-2020-Summary.pdf> retrieved 11 May 2016.

<sup>314</sup> *The Guardian* (25 July 2011) '£25bn defence shortfall leaves Cameron and Osborne at odds', available at <http://www.theguardian.com/politics/2011/jul/18/defence-spending-25bn-cameron-osborne>, retrieved 28 July 2016.

<sup>315</sup> *The Daily Telegraph* (19 July 2011) 'MoD sacrifices manpower to pay for equipment', available at <http://www.telegraph.co.uk/news/uknews/defence/8645851/MoD-sacrifices-manpower-to-pay-for-equipment.html>, retrieved 28 July 2016; Interview, Davis, 27 February 2015; Interviews, Wall, 14 January 2015.

reductions in defence spending, combining both reports presented Fox – and by extension Cameron – with a propitious opportunity. Taking the recommendations of both reports, Fox could now cut the size of army whilst simultaneously offsetting this by increasing the size of the reserves. This had clear political benefits for both Fox and Cameron, allowing them to nullify some of the Conservative backbencher criticism of their defence policies whilst also presenting the army reductions as part of a wider plan of reinvigorating a reserve force that clearly needed reform. And both plans could be couched in the language of reducing overall costs, increasing efficiencies and investing in the reserves. According to one British general heavily involved with FR20, although based on informed advice, Fox’s decision to take both reports and blend their recommendations to create a new integrated regular-reserve force structure, was ‘ad hoc’ and politically opportunistic.<sup>316</sup> Certainly, other senior officers agree that ‘the regular army and the reserves thing came together from different directions. The reserve thing was politically imposed in terms of it being a political motive.’<sup>317</sup> This opportunistic and political rationale behind the decision to implement FR20 would profoundly shape its subsequent development and implementation.

On 18 July, Fox briefed Parliament that, due to a ‘£38 billion black hole’<sup>318</sup> in the defence budget, the army needed to be downsized and restructured. Crucially, Fox did not detail numbers, but reports – later confirmed in Parliament – indicate that the army was told at this time to implement the 82,000 figure outlined in the three-month exercise.<sup>319</sup> Nevertheless, the fact that no figures were released further illustrates not

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<sup>316</sup> Interview, Davis, 27 February 2015.

<sup>317</sup> Interview, Wall, 14 January 2015.

<sup>318</sup> Hansard Commons Daily Debate, 18 July 2011, column 643, available at <http://www.publications.parliament.uk/pa/cm201011/cmhsrd/cm110718/debtext/110718-0002.htm> retrieved 12 August 2015.

<sup>319</sup> Hansard Commons Daily Debate, 12 January 2012, column 644, available at <http://www.publications.parliament.uk/pa/cm201212/cmhsrd/cm120119/text/120119w0002.htm>; *The Guardian* (18 July 2011) ‘Liam Fox announces army cuts but promises extra funds in future’, available at <http://www.theguardian.com/politics/2011/jul/18/liam-fox-army-cuts>, retrieved 28 July 2016.

only the speed with which MoD policy was being formulated at the time – it was clear that detailed planning had yet to be conducted – but also the political sensitivity of the cuts. With the army still fighting in Afghanistan, the extent and timing of any redundancies needed to be carefully considered in order to avoid political fallout.<sup>320</sup> However, Fox stressed that any reductions would be offset by a £1.5 billion investment in the reserves, which would increase the trained strength of the TA from about 19,000 to 30,000 by 2020. Fox stated that: ‘if the Territorial Army develops in the way we intend, we envisage a total force of around 120,000, with a regular to reserve ratio of around 70:30.’<sup>321</sup> The 120,000 figure is particularly interesting as it was the combined size of the army and the trained reserve before the 2010 SDSR introduced the first round of army downsizing, and was also the figure recommended by the Independent Commission. According to Wall, by also including 8,000 untrained reservists in his announcement, Fox was able to claim that:

‘the army was the same size, just the composition was changing... which was an obfuscation and a deliberate lie if we’re really honest... it wasn’t a surprise to any of us [in the army] that, slightly fallaciously, the government had sought to portray the increase in the reserves as a fair compensation for the reduction in the regulars.’<sup>322</sup>

From the outset then, there were tensions between the presentation and reality of FR20.

With the FF20 plan now to be implemented with a much smaller army component, the army ‘quite quickly realised [it] needed to set up a design team that was outside the chain of command... that this wasn’t a “business as usual” proposition.’<sup>323</sup> Following a meeting with the Army Board in London in May 2011, Lieutenant General Nick Carter, assisted by Brigadier Kevin Abraham, were given the freedom to design a new model for the army that would become known as Army2020. As the plan developed during 14 meetings over the next six months, it was tested and adjusted at

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<sup>320</sup> Interview, Wall, 14 January 2015.

<sup>321</sup> Hansard 12 January 2012, column 644.

<sup>322</sup> Interview, Wall, 14 January 2015.

<sup>323</sup> Ibid.

each turn by the Army Board, which consisted of a number of senior generals and civil servants. At each step, the new defence secretary, Philip Hammond, was kept informed of the process by Wall and gave his consent to most of it.<sup>324</sup> However, since replacing Fox in October 2011, Hammond, known as a ‘safe pair of hands’<sup>325</sup> and for his strict information control, had noticeably centralised decision making in the MoD. The Army Board worked directly to him.<sup>326</sup> As a result, when the Board approved the plan in January 2012, it then had to convince many in the MoD, especially those in resourcing, that the proposition was viable.<sup>327</sup> This debate continued for another six months before Hammond announced to Parliament on 5 July 2012 that Army2020 would be implemented.

From the outset, Army2020 was consciously designed to integrate the regular and reserve component. This was a strategic choice and reflected both the need for efficiency and adaptability in the face of strategic uncertainty, and the political desire to reinvigorate the reserves. Overall, Wall directed that the new force should be capable of conducting interventions and conventional deterrence; overseas operations in multinational alliances; and homeland security/resilience tasks. Nevertheless, it appears that supporting one enduring expeditionary operation was the principle around which it organisationally oriented. As a result, Army2020 divided the organisation into a high readiness ‘Reactive Force’ capable of conducting contingency operations and a less ready ‘Adaptive Force’ for follow-on operations. Within both forces was a 36 month operational readiness cycle, whereby brigades in the Reactive Force, and lower units within the Adaptive Force would come up to readiness for potential deployment for 12 out of every 36 months. If deployed, another system known as the ‘harmony guideline’

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<sup>324</sup> Personal communication, Wall, 10 May 2016.

<sup>325</sup> Reuters (15 October 2011) ‘Defence Secretary quits over “adviser” scandal’, available at <http://uk.reuters.com/article/uk-briatin-fox-idUKTRE79D3MI20111015>, accessed 28 July 2016.

<sup>326</sup> Interview, Wall, 14 January 2015.

<sup>327</sup> Interview, Wall, 14 January 2015.

designated that forces at readiness could expect to be deployed once in each five-bloc cycle; in reality for about six of every 30 months. Critically, the less-ready Adaptive Force was to provide the greater capability in roulements four and five of a deployment. Unveiling the plan, Carter described it as: ‘new and imaginative and original... Getting there will be challenging... And none of this happens very quickly, it will be a gradual process.’<sup>328</sup> Most decisively, supporting the ‘Whole Force Concept’, Army2020 outlined a much more prominent operational role for the TA in the Adaptive Force, with the army ‘to deliver a genuinely useable and capable Reserve that is integrated with paired Regular units.’<sup>329</sup> This move alone significantly increased the demand on the reserve component and underscored the post-Fordist principles underpinning Army2020, and especially the logistics component of the plan. This part of Army2020 reduced regular logistics regiments by six and outsourced the capability to the reserves.<sup>330</sup> Indeed, reducing regular logistics units and outsourcing to the reserves to save costs was one of the central tenets of Army2020. The plan directed that the Adaptive Force would have its own logistic support provided by 102 Logistic Brigade, predominantly manned by reservists.

Meanwhile, the scale of the cuts to the army, and the increased reliance on the reserves to deliver previous core capabilities drew much media attention. Headlines such as ‘Army cuts take ‘military gamble’ by placing burden on reserves’; ‘TA can’t recruit enough “quality troops” for plans’; and ‘Army2020: Fighting for the future’ are indicative of the increasing prominence the restructuring plans were coming to have in the public sphere.<sup>331</sup> But by outsourcing core capabilities to the reserves and hence

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<sup>328</sup> House of Commons (2012) *Library Report ‘Army2020’*, 6, available at <http://researchbriefings.files.parliament.uk/documents/SN06396/SN06396.pdf>, retrieved 28 July 2016.

<sup>329</sup> *Transforming the British Army – An Update, July 2013*, 4.

<sup>330</sup> *Transforming the British Army – An Update, July 2013*, 4.

<sup>331</sup> *The Times* (6 July 2012) ‘Army cuts take ‘military gamble’ by placing burden on reserves’, available at <http://www.thetimes.co.uk/tto/news/uk/defence/article3467631.ece>; *The Daily Telegraph* (8 July 2012) ‘TA can’t recruit enough ‘quality troops’ for plans’, available at

putting them at the centre of British defence policy, FR20 ensured that its implementation would attract much media focus and remain a politically sensitive issue for the Conservatives, vulnerable as they were to internal accusations that they had become weak on defence issues.<sup>332</sup> Indeed, the degree to which Cameron was worried about the political implications of FR20's failure, and the threat from backbenchers, was highlighted in September 2012 when he appointed his close ally and former Cabinet whip, Mark Francois, as Minister of State for Defence Personnel. According to senior regular officers, Francois sought to add to the political impetus behind FR20.<sup>333</sup>

### **Organisational Reality Bites**

While the army was now clear on its future size and structure, the reserves planning:

‘was happening in a different department of the army, and it was being handled much more by the department [the MoD] than the army, because it was an externally proposed proposition that had never been fully tested with us... It was a finger in the wind thing, not unreasonable, but there was no science behind it... there was no evidence it could be done. And there was no thought about if you decided to do it how you would actually go about it.’<sup>334</sup>

Richards supports this claim, detailing how ‘the motor for this project was Nick Houghton’s team, operating largely outside the Ministry of Defence process.’<sup>335</sup> The fact that the reserves planning had happened without the similar kind of testing Army2020 had undergone, and in a separate department in the MoD, is significant as it not only indicates the level of distrust between senior regular officers and their political masters on the reserve issue, but also, decisively, the political and ad hoc nature of the plan. Nevertheless, over the next five months the MoD’s reserve plans solidified, and on 8 November 2012 it published its consultation paper – *Future Reserves 2020*:

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<http://www.telegraph.co.uk/news/uknews/defence/9383810/TA-cant-recruit-enough-quality-troops-for-plans.html>; *The Guardian* (5 July 2012) ‘Army2020: Fighting for the future’, available at <http://www.theguardian.com/commentisfree/2012/jul/05/army-2020-fighting-future>, all retrieved 28 July 2016.

<sup>332</sup> BBC News, (5 July 2012) ‘Cutting of 17 Army units faces criticism’, available at <http://www.bbc.co.uk/news/uk-18731157>, retrieved 28 July 2016.

<sup>333</sup> Interview, Davis, 27 February 2015.

<sup>334</sup> Interview, Wall, 14 January 2015.

<sup>335</sup> Richards, *Taking Command*, 299.

*Delivering the Nation's Security Together.* Perhaps most importantly, this Green Paper supported an increase in the TA trained strength to the 30,000 recommended by Houghton's Commission, coupled with a much more significant role for the reserves and their full integration into the Whole Force. However, the date set for this by Hammond at the time was 2018, not 2015 as the Commission had recommended, nor the 2020 deadline that the army appear to have understood.<sup>336</sup> Again, this lack of clarity indicates the friction and confusion in the evolution of FR20. The paper pledged to invest £1.8 billion over the next ten years, increasing the amount recommended by the Commission by £300 million. It also contained a comprehensive list of reforms that would be undertaken in order for the reserves to meet the requirements laid out in the SDSR and Army2020. These included the propositions to rename the TA the Army Reserve to reflect its more integrated role; investments in training and equipment; extended mobilisation powers; increased reservist remuneration and welfare packages; and better engagement with reservist employers.<sup>337</sup>

The Green Paper stressed that with a more deployable Army Reserve contributing 'about 15 percent of the first follow-on brigade deployment to around 40 percent in the fourth and fifth brigades... for the Army in particular, mobilisation of formed organisations, generally at sub-unit, but sometimes at unit level, will be necessary.' Importantly, it stated that [there will be a] change from using the reservist on an individual basis to mobilising formed sub-units.<sup>338</sup> It proposed a 15 percent increase in the annual training requirement to ensure units could deliver collective tasks 'at the platoon, company and battalion' levels. Indeed, the deployment of formed units

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<sup>336</sup> Hansard Commons Daily Debate, 8 November 2012, Column 1026, available at <http://www.publications.parliament.uk/pa/cm201213/cmhsrd/cm121108/debtext/121108-002.htm>. Wall states 2020 in *The Times* (24 February 2012) 'The day of the "citizen soldier" has arrived', available at <http://www.thetimes.co.uk/tto/opinion/columnists/article3330026.ece> both retrieved 28 July 2016.

<sup>337</sup> *Future Reserves 2020: Delivering the Nation's Security Together.*

<sup>338</sup> *Future Reserves 2020: Delivering the Nation's Security Together*, 6, 16, 27.

or sub-units was mentioned at least 14 times. Clearly this was to be a central tenet of FR20.<sup>339</sup> Hammond also stressed the importance of the sub-unit level, announcing: ‘This transformation of the Reserves will see a radical shift in the way in which we use them, with units deployed as formed units or sub-units as well as delivering individual augmentees.’<sup>340</sup> This emphasis on the formed unit was complemented by a similar focus on the routine use of the reserves on operations, which was stressed on 16 occasions in the paper, indicating how the utilisation of the reserves was changing from a force of last resort to one that was integral to the army’s deployment plans. Nevertheless, notwithstanding these aims, much of the Green Paper’s emphasis fell on proposed changes to mobilisation legislation and terms of service, instigating employer/family support initiatives, and in increasing monetary compensation to reservists to boost recruitment and retention. As Edmunds et al. have noted, what the Green Paper was recommending was essentially transactional in nature; a change in the readiness and utility of the reserves in order to generate efficiencies, in return for increased investment and support.<sup>341</sup>

With a new role now clearly defined, recruitment and retention in the Army Reserve moved centre-stage, as senior officers and the media questioned the ability of the reserves to reach its trained strength,<sup>342</sup> and politicians such as Brazier reported ‘horrifying’ problems with the recruitment system.<sup>343</sup> While Hammond stated that he was ‘confident that the numbers we require will be achieved’, the Labour opposition warned of the implications of reducing the army regardless of whether the Army

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<sup>339</sup> Future Reserves 2020: *Delivering the Nation’s Security Together*, 16.

<sup>340</sup> ‘Consultation launched on the future of Britain’s Reserve Forces’ available at <https://www.gov.uk/government/news/consultation-launched-on-the-future-of-britains-reserve-forces>, retrieved 28 July 2016.

<sup>341</sup> Edmunds, et al. ‘Reserve Forces and the Transformation of British Military Organisation’.

<sup>342</sup> *The Times* (19 February 2013), ‘New Model Army’, available at <http://www.thetimes.co.uk/tto/opinion/leaders/article3692188.ece>, retrieved 28 July 2016.

<sup>343</sup> *The Times* (5 November 2012) ‘Red tape chokes Army’s vital recruitment drive’, available at <http://www.thetimes.co.uk/tto/news/uk/defence/article3590065.ece>, retrieved 28 July 2016.

Reserve was meeting its recruitment targets, as did Fox.<sup>344</sup> Indeed, by linking Army2020 and FR20, the success of Conservative's entire reform of the army now increasingly hinged on whether the reserve component could be recruited. In the words of Fox, politically it was becoming 'a numbers game... and we'd taken an enormous gamble with [those] numbers.'<sup>345</sup> Richards also notes that Houghton had outlined to the NSC that the FR20 plan needed testing to prove its practicability, but that 'the government decided to push it through without this sensible precaution.'<sup>346</sup> This echoes Wall's position that the plans to increase the reserve were 'not grounded in military experience, military fact, or any credible evidence,' and Dannatt's that the plan 'was based on hope rather than any science.'<sup>347</sup> Indeed, Richards records that even Houghton felt outmanoeuvred by the politicians, who said to him as they left the NSC: 'My good nature has been taken advantage of.'<sup>348</sup> The top-down political and economic origins of FR20 had ensured its design was an ad hoc, rushed and politically-driven process.

The following consultation process – which lasted less than ten weeks – involved reservists, their families, regulars and employers. By the time it ended, a new TA recruitment drive had been launched, but this could not stop the organisation haemorrhaging 1,000 members per year.<sup>349</sup> The situation was complicated by employer's reservations, with the Confederation of British Industry employer's group stating it had not been properly consulted about 'the biggest change for reserve soldiers since the Second World War.'<sup>350</sup> Meanwhile, with the army continuing to downsize, thereby mounting pressure to fill the reserves, the announcement of the finalised

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<sup>344</sup> Hansard Commons Daily Debate, 8 November 2012, Column 1028.

<sup>345</sup> Interview, Liam Fox MP, 28 May 2015.

<sup>346</sup> Richards, *Taking Command*, 299.

<sup>347</sup> Interview, Wall, 14 January 2015.

<sup>348</sup> Richards, *Taking Command*, 299.

<sup>349</sup> *The Times* (19 February 2013) 'Defence strategy under threat as Territorial Army struggles to entice reservists', available at <http://www.thetimes.co.uk/tto/news/uk/defence/article3692253.ece>, retrieved 28 July 2016.

<sup>350</sup> *The Guardian* (8 November 2012) 'Firms that discriminate against Territorial Army reserves may be sued', available at <http://www.theguardian.com/uk/2012/nov/08/firms-discriminate-territorial-army-may-be-sued>, retrieved 28 July 2016.

reserves proposition was delayed on numerous occasions as it was tested and adjusted. As detailed planning continued in the MoD, a number of issues concerning the deployment of formed reserve units alongside the army emerged, the most decisive of which was the training differential between regulars and reservists. This meant that the army's ultimate legal responsibility to ensure that the reserves were 'accredited, regulated and subject to legislation' underpinned any ability to deploy the reserves as formed units.<sup>351</sup> Although cultural suspicion and institutional rivalry likely played a part, the army correctly argued that there were huge legal implications – for both the reserves and the regulars – of deploying reservist units to high-risk combat environments alongside regular units without providing the similar, time-intensive training required of the regulars. Integrated collective training therefore became the crucial first step toward building reserve sub-unit operational capability.

When the '*Reserves in the Future Force 2020: Valuable and Valued*' White Paper was finally published on 3 July 2013, it was clear that the drive for deployable units had been diluted somewhat due to these organisational realities. While the paper approved the Whole Force concept and the readiness cycle for the reserves, as well as the recruitment, welfare and employer support initiatives outlined in the Green Paper, the requirement to deploy as formed units had been reduced. Although Hammond claimed somewhat disingenuously – and in contrast to Fox – that the 'redesigned structure has been driven primarily by the changed function and roles of the Army Reserve and by the need to reach critical mass for effective sub-unit training',<sup>352</sup> FR20 stated that the army 'while *continuing to deploy individuals*, (author's italics) will have a greater reliance on [reserve] formed sub-units and units' and stressed the reserves

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<sup>351</sup> *Future Reserves 2020*, 22.

<sup>352</sup> Hansard Daily Commons Debate 3 July 2013, Column 50, available at <http://www.publications.parliament.uk/pa/cm201314/cmhansrd/cm130703/wmstext/130703m0001.htm#13070355000074>, retrieved 28 July 2016.

would provide ‘routine capability’ including ‘augmentation, resilience and depth to regular units.’<sup>353</sup> This mention of individual backfilling was important as it lessened expectations that the reserves would only deploy as formed units, which had been a major and continuous strand of the reserve transformation since Policy Exchange first mooted the idea almost three years previously. Crucially, it confirmed that the Army Reserve could continue to contribute to operations as they had in the past, thereby somewhat relieving the collective training burden. Compared to the Green Paper, there was also more emphasis on the sub-unit rather than the unit in the White Paper; a fact confirmed in Parliament when Hammond announced that the Army Reserve ‘will be ready and able to deploy *routinely* at sub-unit level, *and in some circumstances*, [author’s italics] as formed units.’<sup>354</sup> Effectively, the White Paper was vaguer about exactly how the reserves would contribute to operations, therefore buying time for FR20 to deliver.

The routine nature of reservist mobilisation and deployment was also an important part of the White Paper, mentioned eight times in this context. Most importantly, introducing FR20 Hammond clearly outlined that: ‘Under our new model, the use of the Reserves is no longer exceptional or limited to times of imminent national danger or disaster, but is integral to delivering military effect in almost all situations.’<sup>355</sup> Tellingly, Hammond emphasised the new integrated regular and reserve command structure and the ‘greater efficiencies in training and equipment resulting from formal pairing between regular and reserve units.’<sup>356</sup> This emphasis on pairing all regular units with their reserve counterparts in order to ‘deliver high quality training to reservists and the development of fully integrated capabilities’ came to prominence in the White

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<sup>353</sup> Ibid.

<sup>354</sup> Hansard Daily Commons Debate 3 July 2013, Column 50.

<sup>355</sup> Future Reserves 2020, 7.

<sup>356</sup> Hansard Daily Commons Debate 3 July 2013, Column 50.

Paper.<sup>357</sup> While the Independent Commission had recommended it, content analysis reveals that while the Green Paper only mentioned pairing twice, it appeared in its successor no less than 16 times. At this time Brigadier Sam Evans also stressed the importance of: ‘Formalised pairing between a regular and a reserve unit [was the] the important first step... to deliver integrated capability.’<sup>358</sup> Clearly, there had been a change in emphasis. This had been caused by close analysis of how the few previous successful reserve sub-unit deployments had been managed, and was complemented by considerable input from regular units on how best to operate with reserve sub-units.<sup>359</sup> Viewing the White Paper in the context of the evolution of FR20 is instructive because it highlights how organisational frictions and realities caused a number of the main objectives of FR20 to be revised downwards. Decisively, the White Paper recognised that in reality the ability to deploy formed reserve units – either at the sub-unit or battalion level – hinged on close relationships and collective training with regular units, and that this would take time to deliver. This revision hinted at a realisation within government that, aside from recruitment, implementing FR20 would not be as straightforward as originally envisaged.

Hammond’s speech to Parliament on 3 July also unveiled details of the structural and functional transformation of the soon to be re-named Army Reserve. This involved the disbandment of nine major reserve units, with their sub-units either withdrawn, re-roled or re-subordinated in the order of battle. Crucially, eight of these were logistics units, with a further three RLC regiments designated for re-roling. Importantly, in terms of this study, one of these was 155 Transport Regiment which has since become 165 Port and Maritime Regiment. Furthermore, the White Paper created

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<sup>357</sup> *Future Reserves 2020*, 20.

<sup>358</sup> *The Guardian* (2 July 2013) ‘Plan to boost part-time soldier numbers with incentives for employers’, available at <http://www.theguardian.com/uk-news/2013/jul/02/part-time-soldiers-incentives-employers>, retrieved 28 July 2016.

<sup>359</sup> Connelly, *Cultural differences between the regular army and the TA as barriers to integration*.

four new REME and two new intelligence battalions. One of these, 105 REME, is also closely examined later in this study. This disbandment and re-roling of logistics units was central to Army2020's desire to outsource routine logistics capabilities, such as transport and port duties, to the reserves to relieve the burden on the regulars. Simultaneously, the creation of new specialised REME and intelligence units represented the desire to tap the civilian workforce to enable the surge of logistic capabilities during periods of increased demand. As such, the transformation of the Army Reserves itself not only followed the post-Fordist approach, but it would be most profound in the logistics component. Indeed, within both Army2020 and FR20, it also represented an attempt to transform reserve logistics capability along post-Fordism's core-periphery, SCM and JIT principles.

There is a wider point to be made here about FR20's launch, as it informs its subsequent trajectory. The combined effect of the consultation and planning processes meant that the FR20 plan had been almost two years in the making. While this delay was certainly not helped by an overburdened MoD and army staff whose priority was to implement Army2020, it may have also reflected institutional reluctance in parts of the army to endorse the plan and changing political objectives inside government. Nevertheless, the net effect of this delay was that by its release in July 2013 some of the political momentum behind FR20 was already dissipating. This was evidenced by the fact that the policy was launched just before Parliament's summer recess, and was not deemed of sufficient importance for the Prime Minister to launch it. Instead Hammond did so, and he laid most of his emphasis on the investments in reserve equipment, remuneration and welfare, and the closure of TA bases, rather than the 'hard' military capabilities required of routinely deployable sub-units. This approach also helped garner cross-party support for the reforms, even if there was scepticism about the wider defence cuts. As such, Wall described the unveiling of FR20 as a 'soft launch' with

neither Cameron nor Hammond keen to invest their political capital to publicise the plan, perhaps aware as they were already of its shortcomings and the related political risk.<sup>360</sup> This, of course, provides one explanation for the initial failure to attract recruits in the numbers required.

### The Politics of Numbers

If the Cameron government hoped that the publication of the White Paper would settle the reserves issue and buy it some time, it was to be disappointed. Less than a month after its publication, and despite a £3 million investment in a new reserve recruitment campaign, leaked army reports highlighted that the Army Reserve's strength had dropped by 5.3 percent and that recruitment was 50 percent below target, with yearly manning targets unlikely to be met.<sup>361</sup> Of particular note was the loss of senior NCOs who were not prepared to deploy more frequently. Meanwhile, the outsourcing of the army's previously internal, localised recruitment system to business management firm Capita also came under attack, with Brazier again leading the criticism.<sup>362</sup> Signifying his continued distrust of the army, he also blamed the Training and Recruitment branch for the failures.<sup>363</sup> Perhaps unsurprisingly, rumours abounded at this time that the army wanted the reserves plan to fail. Indeed, a regular officer closely involved with Army2020 planning has confirmed that elements in the army did want this to happen, believing that if FR20 failed the political will for cutting the regulars would

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<sup>360</sup> Personal communication, Wall, 10 May 2016.

<sup>361</sup> *The Times* (16 August 2013) 'Army Reserves losing battle for recruits', available at <http://www.thetimes.co.uk/tto/news/uk/defence/article3844224.ece>; *BBC News*(11 August 2013) 'Army cuts: Reservists slow to enlist, leaked memo suggests', available at <http://www.bbc.co.uk/news/uk-23654334>; *The Daily Telegraph* (16 October 2013) 'Reforms have left the Army in chaos', available at <http://www.telegraph.co.uk/news/uknews/defence/10384403/Reforms-have-left-the-Army-in-chaos.html>, all retrieved 28 July 2016.

<sup>362</sup> *The Times*, 'Army Reserves losing battle for recruits'.

<sup>363</sup> *The Times* (20 November 2013) 'Hammond gives ground to rebels before crunch Army vote', available at <http://www.thetimes.co.uk/tto/news/uk/defence/article3926862.ece>, retrieved 28 July 2016.

evaporate.<sup>364</sup> The fact that army reports detailing the problems with reserve recruitment were leaked to the media at this time supports this assertion, whilst again highlighting the role of the media in FR20's development.

The recruitment problem was now becoming acute. Indicating the drive to outsource military capabilities, in March 2012 Capita had signed a £440 million contract to introduce a centralised, automated, and more efficient recruitment system that would free up 800 military personnel. However, in another indication of the ad hoc evolution of FR20, the contract had been negotiated before the policy was confirmed and therefore did not foresee such a rapid expansion of the reserves (in another political twist, Hammond blamed Francis Maude – founder of Policy Exchange and now Cabinet Minister responsible for streamlining the civil service – for this oversight).<sup>365</sup> Information technology systems were also found wanting, while the paradox that a more deployable reserve required greater medical screening and hence decreased the number of reserves became painfully clear.<sup>366</sup> The situation was not helped by the fact that in 2010 the newly-elected Conservative government had banned recruitment advertising, thereby reducing inflow and eventually creating a serious recruitment 'pinch' by the end of 2012. As 2013 progressed, the media recognised that the cornerstone of the government's defence policy was failing and focused intensely on the reserves recruitment issue, routinely reporting the MoD's quarterly personnel reports.<sup>367</sup> By October, the government was facing growing criticism not only from the Labour

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<sup>364</sup> Personal communication, former regular army officer, 19 August 2015.

<sup>365</sup> Interview, Wall, 14 January 2015; *The Times* (17 October 2013) 'Flawed plan to boost TA could put Britain at risk, critics warn', available at

<http://www.thetimes.co.uk/tto/news/uk/defence/article3896636.ece> retrieved 28 July 2016; Interview, Davis, 27 February 2015.

<sup>366</sup> Interview, Davis, 27 February 2015; Brazier J. (undated) 'Speech at Special Forces Club'.

<sup>367</sup> *Sky News* (14 November 2013) 'Army Reserve Numbers Drop in Blow To MoD' available at <http://news.sky.com/story/1168669/army-reserve-numbers-drop-in-blow-to-mod>, retrieved 28 July 2016.

opposition and former senior officers,<sup>368</sup> but also from its backbenches, where former defence secretaries Fox and Malcolm Rifkind lent their support to a group led by John Baron that was now calling for a review of the cuts to the army in the wake of the poor reserve recruiting figures.<sup>369</sup> Perhaps in recognition of the growing threat of a backbench revolt, at this time Francois was appointed Minister of State for the Armed Forces, with responsibility for army plans.

Matters came to a head in mid-November 2013 when Baron tabled a bill in Parliament calling for a delay to the army cuts until the reserves could meet its recruitment targets. In a sign of the deep divisions within the Conservatives over FR20, Baron received the support of 22 Tory rebel MPs, as well as the backing of most of the Labour opposition. The local political dynamic of the Baron rebellion is also noteworthy: he is a former member of the Royal Regiment of Fusiliers, whose second battalion was to be disbanded in the next round of redundancies. With the forthcoming vote attracting heavy media attention, both Hammond, Houghton and Wall reiterated their support for the plan, with Hammond stressing that any delay in implementing FR20 would send a ‘negative signal’ to reservists, and, somewhat ironically: ‘make the whole agenda into a political football.’<sup>370</sup> However, the night before the vote Hammond met with Brazier – who was appears at this stage to have still favoured Baron and, as the driving force behind FR20, commanded respect on the issue from other Tory backbenchers – in a bid to defuse the situation. In this meeting Brazier demanded an

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<sup>368</sup> *The Times* (27 October 2013) ‘Ex-Army head calls for cuts to be paused’, available at <http://www.thetimes.co.uk/tto/news/uk/defence/article3905727.ece>; *The Guardian* (3 July 2013) ‘Army reservists to get military pensions and healthcare benefits’, available at <http://www.theguardian.com/uk-news/2013/jul/03/army-reservists-military-pensions; both retrieved 28 July 2016>; *The Times*, ‘Flawed plan to boost TA could put Britain at risk, critics warn’; *Sky News*, ‘Army Reserve Numbers Drop In Blow To MoD’.

<sup>369</sup> *The Times* (15 November 2013) ‘Numbers fall in Territorial Army despite major recruitment drive’, available at <http://www.thetimes.co.uk/tto/news/uk/defence/article3922085.ece, retrieved 28 July 2016>; *The Daily Telegraph* (25 October 2013) ‘Army may have to backtrack on use of reservists, former Defence Secretary warns’; *Sky News*, ‘Army Reserve Numbers Drop In Blow To MoD’.

<sup>370</sup> *BBC News* (20 November 2013) ‘Army Reserve rebellion in prospect among Tory MPs’, available at <http://www.bbc.co.uk/news/uk-politics-25012907, retrieved 28 July 2016>.

annual external audit in return for his support for Hammond, which the latter acceded to.<sup>371</sup> It is unclear if Brazier was also promised the Minister of Reserves post at this meeting as well, but it is significant that within months of coming out in support of Hammond he had been appointed to the position. While Brazier's deep knowledge and passion for the reserves would make him a natural choice, one senior officer has described Brazier's subsequent promotion in July 2014 as a 'political move' designed to give the outspoken backbencher ownership of the reserves problem and hence 'shut him up.'<sup>372</sup> Whatever the truth behind Brazier's appointment, it is clear that once he became responsible for implementing FR20 he became far more supportive of it.<sup>373</sup>

The Tory rebellion highlighted the mounting political costs of FR20. Over the course of the next year, intense political and media focus on the reserves recruitment issue continued as numbers failed to rise. In January 2014 the Defence Select Committee raised serious concerns over the ability of the Army Reserve to meet its 2018 manning target, while in June the National Audit Office (NAO) concluded that current recruitment trends suggested 'that it could be 2025 before the trained strength of the reserve is increased to 30,000.'<sup>374</sup> That same month, the government's own internal watchdog, the Major Projects Authority (MPA), gave FR20 a red rating, indicating that it believed the delivery of the project 'appears to be unachievable.'<sup>375</sup> Unsurprisingly, this view was supported by Baron, who called FR20 'a cynical "balance sheet" exercise by the MoD'.<sup>376</sup> In July the first audit of the MoD External Scrutiny Team (EST)

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<sup>371</sup> *The Times*, 'Hammond gives ground to rebels before crunch Army vote'.

<sup>372</sup> Interview, Davis, 27 February 2015.

<sup>373</sup> *The Daily Telegraph* (13 November 2014) 'Shocking' recruitment figures show Army Reserve barely growing', available at <http://www.telegraph.co.uk/news/uknews/defence/11229680/Shocking-recruitment-figures-show-Army-Reserve-barely-growing.html>; *Politics Home* (7 March 2015) 'Julian Brazier: Plenty in Reserve', available at <https://www.politicshome.com/foreign-and-defence/articles/house/julian-brazier-plenty-reserve>, both retrieved 28 July 2016.

<sup>374</sup> National Audit Office, *Report on Army2020*.

<sup>375</sup> *Politics Home*, 'Julian Brazier: Plenty in Reserve'.

<sup>376</sup> *The Daily Telegraph* (11 June 2014) 'Army plan in chaos as cuts undermine security', available at <http://www.telegraph.co.uk/news/uknews/defence/10891715/Army-plan-in-chaos-as-cuts-undermine-security.html>, retrieved 18 May 2016.

criticised the implementation of FR20.<sup>377</sup> More damagingly, the 2014 report by the NAO on FR20 also noted that: ‘We have not seen evidence that the feasibility of increasing the number of trained reserves within the planned timescale, needed to provide the required capability, was robustly tested.’<sup>378</sup> And two months later the Public Accounts Committee concluded:

‘It is astonishing that the Ministry of Defence went ahead with plans to cut back the regular Army by 20,000 and increase the number of Reservists without testing whether this was doable and without properly consulting the Army itself.’<sup>379</sup>

It also noted how the changes to the Capita contract had incurred additional costs of £70 million, considerably reducing the contracts projected savings and hence the rationale of outsourcing recruitment.<sup>380</sup>

With both Cameron and Hammond’s political capital heavily invested in the project, questions in Parliament on the transparency of, and delays in, publishing reserve recruitment data,<sup>381</sup> resulted in increasing political involvement in the recruitment issue that ‘almost distracted the army in a perpetual quest for data’.<sup>382</sup> A growth plan was initiated and another further recruitment drive took place in July 2014, but with numbers failing to rise, the subsequent major relaxation of the age limit caused derision of the Army Reserve as a ‘Dad’s Army’.<sup>383</sup> Faced with this reality, Hammond then appears to have delayed the requirement to reach its 30,100 target until the end of

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<sup>377</sup> Ministry of Defence (2014) *Future Reserves 2020: 2014 External Scrutiny Team Report*, available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/330002/20140710-CO-POL-FR20-EST-Reports-2014\\_Final\\_.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/330002/20140710-CO-POL-FR20-EST-Reports-2014_Final_.pdf) retrieved 12 September 2016; Defence Select Committee (2014) *Ninth Report: Future Army2020*, London: TSO, para 69.

<sup>378</sup> National Audit Office, *Report on Army2020*, 6.

<sup>379</sup> Comments made by Nicola Hodge MP, on release of Public Accounts Committee *Report on Army2020*, Eleventh Report, 5 September 2014, available at <http://www.parliament.uk/business/committees/committees-a-z/commons-select/public-accounts-committee/news/report-army-2020/> retrieved 17 May 2016.

<sup>380</sup> Ibid.

<sup>381</sup> Hansard Commons Daily Debate, 9 December 2013, available at <http://www.publications.parliament.uk/pa/cm201314/cmhansrd/cm131209/text/131209w0003.htm#13120943000842> retrieved 28 July 2016.

<sup>382</sup> Interview, Wall, 14 January 2015.

<sup>383</sup> *The Times* (14 November 2014) ‘Dad’s Army: MoD ready to call up the over-50s’, available at <http://www.thetimes.co.uk/tto/news/uk/defence/article4267352.ece>, retrieved 28 July 2016.

the financial year 2018 (April 2019).<sup>384</sup> Meanwhile, by mid-2014, Cameron and Hammond had detected that the political risk of the reserves was not diminishing and therefore decided to ‘let it go.’<sup>385</sup> Indeed, by July 2014 Brazier had been appointed reserves minister and Michael Fallon had replaced Hammond as defence secretary. Interestingly, Fallon’s first announcement regarding FR20 was to change the accounting criteria for what military posts counted as Army Reserve service, adding about 1,000 personnel to the organisation’s trained strength. While this change could be organisationally justified, the adjusting of these metrics also had clear political benefits.<sup>386</sup>

With the political heavyweights divested of FR20, the numbers game also appears to have contributed to the beginning of a re-assessment of the role expected of the reserves in late 2014. After a change in senior personnel in the MoD, the first indication of a potential shift in policy came in October 2014, when Carter, now CGS, appeared to undermine the whole rationale behind FR20, stating:

‘It doesn’t really matter how large your Army is, the nation would be the worse for not having a Reserve. A Reserve is what it sounds like; it’s there for worst-case...The sense that there is an obligation to be routinely and regularly used is not how I would see this being used. It is there for worst-case. It’s certainly not there to mitigate the reduction in regular numbers.’<sup>387</sup>

This comment directly contradicted Fox’s, the White Paper’s, and Hammond’s position that Army Reserve would be used ‘routinely’ to do tasks that were once the ‘exclusive domain of the regulars.’<sup>388</sup> Crucially, it highlighted the dissonance between FR20’s

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<sup>384</sup> Interview, Davis, 27 February 2015; *The Daily Telegraph* (1 July 2014) ‘Civil servants to fill Army reserves gaps’, available at <http://www.telegraph.co.uk/news/uknews/defence/10938988/Civil-servants-to-fill-Army-reserves-gaps.html>, retrieved 28 July 2016. Also Written Statement to Parliament, 19 December 2013.

<sup>385</sup> Interview, Wall, 14 January 2015.

<sup>386</sup> This view supported in personal communication, Wall, 10 May 2016.

<sup>387</sup> *The Daily Telegraph* (28 October 2014) ‘Reservists are no replacement for regular troops, head of Army says’, available at <http://www.telegraph.co.uk/news/uknews/defence/11194100/Reservists-are-no-replacement-for-regular-troops-head-of-Army-says.html>, retrieved 28 July 2016.

<sup>388</sup> *The Daily Telegraph*, ‘Reservists are no replacement for regular troops, head of Army says’.

political and organisational survival origins on the one hand, and the reality of delivering a more deployable reserve on the other.

Carter also highlighted the ‘equilateral triangle between [the reservist’s] employer, his family and himself. What you have to do is explain it’s here for worst case – and keep that triangle absolutely in balance.’<sup>389</sup> This comment is interesting as it provides a clue as to why Carter was now backing away from a more operational role for the reserves. With the latest recruitment figures about to be revealed in headlines as ‘shocking’,<sup>390</sup> and many of the larger employers still worried that the FR20 plan would drastically increase the demands placed on reservists, Carter’s reappraisal was apparently aimed at both the employer lobby, and at attracting more recruits. Carter himself hinted at this, stating there would be a ‘refinement’ in the army’s message in order to emphasise to recruits that service would not impinge too heavily on civilian life: ‘that’s what we’ll do, we’ll explain it in the right way’.<sup>391</sup> Further supporting this, at around this time Carter launched a ‘Darwinian’ approach to establish the sustainability of unit structures and locations, essentially giving reserve units a year in which to recruit above established strength in order to confirm their sustainability.<sup>392</sup> There were other likely factors at play beyond recruitment. As the new CGS, Carter was untainted by the past political battles over army cuts, and FR20 itself, and as Army2020’s architect also came with his own political capital. The recruitment failures and the mounting criticism of this in the media and from the oversight committees gave him a strong evidential base from which to begin to justify a change of position, while the fact that both Cameron and Hammond had divested their own political capital from

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<sup>389</sup> Ibid.

<sup>390</sup> *The Daily Telegraph*, 'Shocking' recruitment figures show Army Reserve barely growing'.

<sup>391</sup> BBC Radio 1, (28 October 2014) 'Reservists are no replacement for regular troops, head of Army says'; World at One Programme, interview available at <http://www.bbc.co.uk/programmes/p029l7wg>, retrieved 12 May 2016.

<sup>392</sup> Interview, Carter, 11 May 2016.

the project – effectively leaving the more interested Brazier to oversee it – meant that there was less political will to resist this change of message in the first place.

With recruitment and retention figures beginning to rise, by mid-2015 Brazier was confident that ‘current strengths are running ahead of schedule’<sup>393</sup>, and while progress has been made, politicians and senior officers such as Fallon and Houghton continued to stress that FR20 will take time to implement.<sup>394</sup> Indeed, one senior officer heavily involved in the FR20 process has stated that the timescale for the reforms is unrealistic due to the ‘complete underestimation of the neglect of the TA in terms of underinvestment’.<sup>395</sup> Against this backdrop, sustained criticism of the reduction in the size of the army has also continued, especially after it emerged that the army had reduced to below the 82,000 target three years faster than anticipated, forcing the MoD to rehire retired personnel, and causing media reports that the British armed forces had been left in ‘chaos’.<sup>396</sup> Although the EST stated in its June 2015 report, that: ‘Our assessment is that FR20 remains on or near track for delivery’ it also remained cautious, while only days later it was reported that the MPA had again given FR20 a red score, indicating that ‘successful delivery of the project appears to be unachievable.’<sup>397</sup> With the reduction in the army complete, but the reserves still badly under-recruited, the sustainability of the Army2020 deployment model, and in particular the Army

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<sup>393</sup> Hansard Commons Daily Debate, 27 November 2014; 8 June 2015, available at <http://www.publications.parliament.uk/pa/cm201415/cmhansrd/cm141127/wmstext/141127m0001.htm#14112769000171>, retrieved 28 July 2016.

<sup>394</sup> *The Daily Telegraph* (1 July 2015) ‘Michael Fallon admits government is struggling to recruit Army reservists’, available at <http://www.telegraph.co.uk/news/uknews/defence/11710383/Michael-Fallon-admits-government-is-struggling-to-recruit-Army-reservists.html>; Ministry of Defence ‘New reservists inspected by Chief of Defence Staff’, available at <https://www.gov.uk/government/news/new-reservists-inspected-by-chief-of-defence-staff>, both retrieved 28 July 2016; *The Times*, ‘Numbers fall in Territorial Army despite major recruitment drive’.

<sup>395</sup> Interview, Davis, 27 February 2015.

<sup>396</sup> *The Sunday Times* (9 August 2015) ‘Redundant troops rehired as army marches into ‘chaos’’, available at [http://www.thesundaytimes.co.uk/sto/news/uk\\_news/article1591283.ece](http://www.thesundaytimes.co.uk/sto/news/uk_news/article1591283.ece), retrieved 28 July 2016.

<sup>397</sup> National Audit Office (2015) *Future Reserves 2020: 2015 External Scrutiny Team Report*, available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/447168/20150622-FR20\\_EST-Report-2015-Final.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/447168/20150622-FR20_EST-Report-2015-Final.pdf), retrieved 28 July 2016; *The Financial Times* (25 June 2015) ‘Army reservist plans “unachievable,” watchdog warns’, available at <http://www.ft.com/cms/s/0/2fb8accc-1b56-11e5-a130-2e7db721f996.html#axzz3ibnFhzxCboth>, retrieved 28 July 2016.

Reserve's increased contribution from round four onwards, remained in question. Indeed, at this time Baron stated the Army2020 and FR20 was 'a plan that has produced a capability gap in the short term and will prove a false economy in the long term and we will live to regret it.'<sup>398</sup> For his part, Fox has also said that FR20 was 'badly synchronised'.<sup>399</sup>

Not that this is surprising given the past attempts to transform the reserves. One senior army officer heavily involved with the reserve recruitment process has stated that the FR20 timescale is 'fundamentally flawed' and, when seen in the context of past periods of reform, is in fact a '20 year transition'.<sup>400</sup> Similarly, Wall has spoken of the need to take a strategic view of the timeline and that the 'army should differentiate between the short-term numbers game, which is a political plan, and establishing [FR20] properly so it stands the test of time and is a system that has the resilience to work well in a crisis'.<sup>401</sup> Unsurprisingly, in the army's view, the pairing of regular and reserve units is central to this, not only in terms of delivering reservist capability but also in terms of fostering better relationships and offering reservists better opportunities. Moreover, the deployable sub-unit requirement still raised questions about politicians' risk appetite for deploying formed reserve units into high threat environments. This is compounded by the fact that reserve commanders are less experienced due to shorter qualifying courses and therefore, conceptually at least, are a greater risk than their regular counterparts. Given these recruitment and risk issues, at a meta-organisational level there are therefore clearly frictions concerning the implementation of FR20.

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<sup>398</sup> *The Financial Times* 'Army reservist plans "unachievable," watchdog warns'.

<sup>399</sup> Interview, Fox, 28 May 2015.

<sup>400</sup> Interview, Davis, 27 February 2015.

<sup>401</sup> Interview, Wall, 14 January 2015

## **Conclusion: Politics, Strategy and Organisational Survival**

As this chapter has shown, politics and ideology have played a crucial role in the debates about FR20 and its subsequent organisational evolution. These political origins, located within the backbench of the Conservative party and closely related to the weak position of the Prime Minister, quickly fused their political goal of reinvigorating the reserves with economic arguments about the need for a cheaper, smaller land force capable of meeting a diverse array of global threats. This in turn led to FR20's renewed emphasis on the expansion of the Army Reserves and its integration with the regular army.<sup>402</sup> However, along the way, politics, economics, stakeholder rivalry, strategy and organisational resistance have all continued to profoundly shape FR20, with strong lobby groups in Parliament, the army, the reserves and the media contesting the rationale and vision for this transformation. At each stage of FR20's evolution there were clear policy changes due to tensions between these groups and the dissonance between desired political outcomes and organisational realities. Indeed, for all of FR20's modernity and professed originality, the fundamental factors curtailing reserve reform – that of recruitment, budgets and strategy – appear to have remained remarkably constant. However, it is clear that in the current context, the highly contested political situation was unique to the period and the major source of transformation. Meanwhile, recruitment remains as, and arguably more, important to the development of the reserves as it did in previous eras. While the exact context may change, the numbers game has constrained the ability to transform the reserves and hence shape its future use and structure, and that of the army.

Perhaps more importantly, the current system of placing units on five year rotations and tiered readiness cycles has political benefits. By locking units into a deployment, recovery and training cycle, ‘which is how people defend against the civil

service, the treasury and officials<sup>403</sup> it becomes increasingly difficult to reduce the army any further without seriously threatening the coherence of the post-Fordist rotational system. Army2020, and within it FR20, therefore not only provides the kernel for which to expand on in a national emergency, it is also an insurance policy for the organisation against further defence cuts. Herein lies its originality. It is not only a solution to economic and strategic pressures that are similar to those of the past, but also a buffer against future politician's desire, and ability, to further reduce the size of army. Such a political view of British military capability is perhaps even more applicable to the reserves, with its attempt to integrate formed sub-units into the Army's readiness cycle. At considerable political and economic cost, FR20 has all but guaranteed the Army Reserves' organisational survival. These costs have included further damage to that identified in British civil-military relations during Blair's premiership, and also, as Chapter Six will discuss, forced politicisation of the army at the grass-roots level.<sup>404</sup> Nevertheless, FR20's underlying political goal, the reinvigoration of the reserves, has arguably already been met. But it remains to be seen if it will deliver the military capability originally envisaged. This fact may highlight the most important reason for the current transformation.

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<sup>403</sup> Interview, Lamb, 13 July 2015.

<sup>404</sup> Bailey et al. *British Generals in Blair's Wars*.

## Chapter Five

### Post-Fordism and the Transformation of Military Logistics

So far, I have examined the historical cases of reserve reform and the political context of FR20 in order to contextualise the current transformation. However, it will also be remembered that FR20 placed heavy emphasis on the domain of logistics. It will be remembered that as the policy stated ‘Greater reliance will be placed on the Reserves to provide routine capability... primarily in the areas of ... combat service support (such as logistics...)’, it is therefore necessary to understand how military logistics have developed in the 21<sup>st</sup> Century.<sup>405</sup> Indeed, this attempt to transform the reserves and especially its logistics component cannot be understood without recognising the drastic changes in how logistics is delivered. Consequently, it is necessary to discuss the evolution of logistics in significant detail before examining the specific new methods of organising and delivering logistics in the reserves. Thus, in this chapter I explore the wider processes driving the recent development of Western military logistics in order to understand the wider organisational context for FR20, and ultimately, the reserves logistics sub-units examined later in this study. It is crucially important to situate FR20 within the wider post-Fordist conceptual approach to military logistics as the policy vastly increased the capability requirements expected of reserve logistics sub-units, and hence the need for greater professionalism and cohesion within them. Furthermore, the post-Fordist approach to logistics not only immediately affects the sub-units examined in this study through the processes identified in this chapter, it also provides a

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<sup>405</sup> Future Reserves 2020, 22.

historically novel solution to the recurrent organisational problems experienced in past periods of reserve reform I outlined in Chapter Three.

In this chapter, I make two arguments. Firstly, I draw on the existing post-Fordist literature to provide a conceptual framework for understanding the recent transformation of Western military logistics. In doing so, I challenge the classical literature on military logistics to show how much of what has been written on the subject is either out of date and lacking sociological theory. Secondly, I combine this post-Fordist framework with the transformation literature to show how these changes have occurred through the simultaneous processes of centralisation; supply chain management and outsourcing; using core and periphery forces; and by adopting a networked approach to logistics. Throughout, evidence is provided from US, British and NATO military logistics structures and practices. The relevance of the US' adoption of a post-Fordist approach to logistics is critical. As I will show, it has predominantly led the way in this regard, subsequently influencing both the UK and NATO to follow their 'best practice'. The conclusion argues that a logistics transformation has occurred, is ongoing, and that what academics have termed post-Fordism is a useful conceptual framework to understand it. Indeed, it argues that such is the scope and nature of this transformation that it has had a profound impact on Western military force structures, and ultimately, their strategic flexibility.

Since the end of the Cold War, numerous authors have identified a major shift in the nature of modern conflict and a transformation in the organisation of Western military forces.<sup>406</sup> Replacing inter-state conventional conflicts, insurgencies, proxy and civil wars, and terrorism have come to dominate the character of the 'new wars' the West has fought. Meanwhile, enabled by the advanced technology of the Revolution in

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<sup>406</sup> Kaldor, M. (1999) *New and Old Wars: organised violence in the global era*, Cambridge: Polity; Duffield, M. (2001) *Global Governance and the New Wars*, London: Zed Books, Smith, R. (2005) *The Utility of Force*, London: Allen Lane.

Military Affairs (RMA), smaller, more professional, capable, and agile combat forces are orienting themselves toward a more diverse set of expeditionary missions in more operationally challenging locations around the globe.<sup>407</sup> These trends have been accompanied by the simultaneous growth in the privatisation of Western militaries.<sup>408</sup> While debate remains over the extent of some of these changes,<sup>409</sup> in almost all cases, the focus of the works that examine these military transformations has been on combat forces.

Writing in the *The Sources of Military Change*, Chris Demchak was one of the first to consider the conceptual, systematic, and organisational implications associated with the integration of the information technologies (IT) associated with the RMA into Western doctrines. For Demchak, at the systematic level, this IT-enabled transformation has the potential to make combat forces more fragile rather than robust. She argues that ‘the long term-structural effects of the emergent worldwide change in military organisation, based on information technology, are not well understood,’ and that operational effectiveness depends on fewer surprises.<sup>410</sup> This, in turn, is reliant on less complexity, greater advanced knowledge, and better responsiveness through redundancy. But IT systems in fact function to enable a way of operating in opposition to these requirements.<sup>411</sup> Thus, Demchak argues there is a ‘poor systems fit’ between modern military organisation and reality, and she places the blame for this on the failure

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<sup>407</sup> King, *The Transformation of Europe’s Armed Forces: From the Rhine to Afghanistan*; Demchak, C. (2003) ‘Creating the Enemy: Global Diffusion of the Information Technology-Based Military Model’, in Goldman, E and Eliason, L. (eds) *The Diffusion of Military Technology and Ideas*, Stanford, California: Stanford University Press; King, A. (2009) ‘The Special Air Service and the Concentration of Military Power’, *Armed Forces and Society*, Vol. 35(4).

<sup>408</sup> Avant, D. (2005) *The Market for Force*, Cambridge; Cambridge University Press; Kinsey, C. (2005) ‘Regulation and Control of Private Military Companies’, *Contemporary Security Policy*, 26(1); Krahmann, E. (2005) ‘Security Governance and the Private Military Industry in Europe and North America’, *Conflict, Security and Development*, 5(2).

<sup>409</sup> Berdal, M. (2003) ‘How “new” are “New Wars”? Global economic change and the study of civil war’, *Global Governance*, 9.

<sup>410</sup> Demchak, C. (2002) ‘Complexity and Theory of Networked Militaries’, in Farrell, T., and Terriff T. (eds) *The Sources of Military Change*, 221.

<sup>411</sup> Ibid, 225.

of the military to adopt a network approach needed to underpin advanced IT use, and on the ‘strongly US tendency to inappropriately and incompletely transfer private firm lessons to public task environments.’<sup>412</sup> As a result, Demchak argues that militaries that have transformed around RMA principles will be prone to the ‘emergent surprises’ associated with complex systems.<sup>413</sup> Demchak’s analysis is highly interesting as it not only represented an early attempt to understand the systematic impact of the RMA, it also tied the adoption of its principles to the military’s emulation of civilian businesses. However, Demchak only considers combat forces in her analysis, thereby leaving open the question of if and how logistics systems and practices have transformed, and if so what are the implications of such a transformation?

Despite this focus on combat forces, strategists, military commanders, and theorists throughout the ages have all remarked on the importance of logistics in successful combat operations and, ultimately, in implementing strategy.<sup>414</sup> As General Omar Bradley’s oft-cited quote that ‘Amateurs study strategy and tactics, professionals study logistics’ highlights, in the professional military, combat commanders themselves view the study of logistics as fundamental to the success of operational plans.<sup>415</sup> Although the last decade has witnessed intense military activity, and at times strong media focus on Western military logistics failures, international relations and military sociology scholars have generally shown little interest in military logistics. While those academic works that do exist on contemporary military logistics note that ‘dramatic change’ has occurred in the past 20 years, they also state this change remains understudied.<sup>416</sup> Moreover, much like the RMA, it is important to situate the start of the

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<sup>412</sup> Ibid, 222.

<sup>413</sup> Ibid, 223.

<sup>414</sup> Kane, *Military Logistics and Strategic Performance*, xiv.

<sup>415</sup> Pierce, T. (no date) ‘US Naval Institute Proceedings’, 122 (9), 74.

<sup>416</sup> Rutner, S. et al (2012) ‘Logistics evolution: a comparison of military and commercial logistics thought,’ *The International Journal of Logistics Management*, 23 (1), 96; Erbel, M. and Kinsey, C. (2015) ‘Think Again- Supplying War: Re-appraising Military Logistics and Its Centrality to Strategy and War’ *Journal of*

British transformation of military logistics within its US context. As I show in this chapter, the British military has consistently mirrored the US example in terms of adopting new logistics concepts and doctrine. Similarly, it is also important to understand that this logistics transformation is not unique to the British and US militaries; NATO, and non-NATO states are also adopting post-Fordist approaches to organise their logistics and wider force structures.

## Military Logistics Literature

After decades of neglect, military logistics is beginning to receive scholarly attention. In 2009, Michael O'Hanlon detailed the budgetary and logistics constraints on US military strategy and force projection.<sup>417</sup> In 2012, Matthew Uttley and Christopher Kinsey discussed the importance of logistics in warfare, applying the British principles of logistics to contemporary conflicts. They argued that 'the inherent nature of defence logistics... has remained constant since the era of ancient warfare' and that 'the steps required to construct and operate a logistics system have remained conceptually simple and timeless'.<sup>418</sup> Very recently, Mark Erbel and Christopher Kinsey have argued that a distribution-based Revolution in Military Logistics (RML) has indeed occurred, and reiterated that military logistics has a deeply reciprocal relationship with strategy,<sup>419</sup> while Eugenio Cusumano has also outlined how logistics constraints shape operations.<sup>420</sup> John Louth has provided detailed analyses of the problems with current British defence logistics and argued that increasing operational complexity must be embraced in finding solutions to these problems.<sup>421</sup> Interestingly, David Shouesmith has noted how this complexity is a function of the changes in the nature of the modern state

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*Strategic Studies*, 1, available at

<http://www.tandfonline.com/doi/abs/10.1080/01402390.2015.1104669> retrieved 12 September 2016.

<sup>417</sup> O'Hanlon, M. (2009) *The Science of War*, Princeton: Princeton University Press.

<sup>418</sup> Uttley and Kinsey, 'The Role of Logistics in War'; 402, 405.

<sup>419</sup> Erbel, M. and Kinsey, C. (2015) 'Think Again- Supplying War: Re-appraising Military Logistics and Its Centrality to Strategy and War', *Journal of Strategic Studies*, 1.

<sup>420</sup> Cusumano, E. (2016) 'Bridging the Gap: Mobilisation Constraints and Contractor Support to US and UK Military Operations', *Journal of Strategic Studies*, 39(1).

<sup>421</sup> Louth, J. (2015) 'Logistics as a Force Enabler', *RUSI Journal*, 160(3).

and its military forces, and how they should be used.<sup>422</sup> Meanwhile, Mikkel Rasmussen argues for closer integration of civilian business strategy and organisation in Western militaries.<sup>423</sup> However, while these recent works indicate that scholars are converging on the topic, I would contend that they lack a conceptual framework for explaining the recent changes in military logistics, and make no attempt to explain the wider processes that have led to these changes.

As a result, and despite earlier works on military logistics,<sup>424</sup> Van Creveld's *Supplying War* is still viewed as the seminal work on the subject. In it, Van Creveld investigates logistics in predominantly European land campaigns from the 16<sup>th</sup> Century to the 1944 Allied invasion of Normandy. For Van Creveld, the method of supplying armies during the period 1560-1715 was essentially feudal, based on Ancien Regime society, and in arguing that the military logistics system could not change until society changed, Van Creveld implicitly acknowledges that military logistics is fundamentally related to wider modes of production.<sup>425</sup> This analysis chimes with other scholars who have examined how methods of supplying armies often influenced the development of the European state.<sup>426</sup> However, in his subsequent chapters, Van Creveld challenges the orthodox view of the three-phased development in military logistics systems. The first two of these phases were identified by Clausewitz, who labelled the evolution of the depot system and the subsequent return to foraging under Napoleon 'revolutions' in supply and maintenance.<sup>427</sup> The final phase emerged in the 20<sup>th</sup> Century as military forces in the industrialised era became increasingly reliant on continual supply from the

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<sup>422</sup> Shouesmith, D. (2001) 'Logistics and Support to Expeditionary Operations', *RUSI Defence Systems*, 14(1).

<sup>423</sup> Rasmussen, M. (2015) *The Military's Business: Designing Military Power for the Future*, Cambridge: Cambridge University Press.

<sup>424</sup> Thorpe, G. (2012) *Pure Logistics: The Science of War Preparation*, 2<sup>nd</sup> edition, Charleston: Nabu Press.

<sup>425</sup> Van Creveld, *Supplying War*, 21.

<sup>426</sup> Van Creveld, *Supplying War*, 182.

<sup>427</sup> Clausewitz, C. (1989) *On War*, (ed and trans Howard M. and Paret P.) Princeton: Princeton University Press, 148.

rear. In challenging the veracity of these phases with detailed evidence from each campaign, Van Creveld follows a contrarian impulse that has defined much of his career.

In perhaps his most controversial chapter examining the highly detailed, synchronised and sophisticated Allied logistics plan for Operation Overlord, Van Creveld argues that this plan did not survive contact with the beaches, and that improvisation was key to keeping the allies supplied.<sup>428</sup> Indeed, for Van Creveld, improvisation defines successful military logistics. Despite an acknowledgement of the need for preparation,<sup>429</sup> Van Creveld's central, and perhaps counter-intuitive argument, is that these preparations' impact on operations is limited and does not always equal success. He states that flexibility, resourcefulness and determination can overcome logistics weaknesses, and in doing so, he argues that continuity – in the form of logistical improvisation – is the defining characteristic of military logistics through the ages.<sup>430</sup> Decisively, Van Creveld remains unconvinced that systematic improvement in military logistics is possible as 'the results of the only comprehensive effort which was made in this direction [were not] particularly encouraging.'<sup>431</sup> This is a contentious position. While it downplays the importance of military logistics planning and systems in the outcome of the campaigns Van Creveld examines, it also contradicts the opinions of many modern commanders on the importance of sound logistics preparations.<sup>432</sup> It can also be argued that Van Creveld's reasoning introduces an element of academic nihilism to the subject, for if improvisation is decisive, what is the point of studying military logistics doctrine and systems?

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<sup>428</sup> Van Creveld, *Supplying War*, 209.

<sup>429</sup> Van Creveld, *Supplying War*, 202.

<sup>430</sup> Ibid, 203.

<sup>431</sup> Ibid, 236; Kane makes a similar point in *Military Logistics and Strategic Performance*, 7.

<sup>432</sup> See Pagonis, Lieutenant General W. (1992) *Moving Mountains*, Boston: Harvard Business School Press; Smith, Lieutenant General R. (1995) 'The Commander's Role' in White, Major General M. (ed) *Gulf Logistics: Blackadder's War*, London: Brasseyes.

Despite its original contribution, *Supplying War* has been critiqued by a number of scholars, including for its skewed sampling.<sup>433</sup> Thomas Kane has launched a sustained challenge to Van Creveld's suggestion that logistics preparations are 'futile'<sup>434</sup> by examining campaigns from the Second World War to the onset of the RMA. In all these cases, Kane details how careful attention to logistics planning and execution acted not only as an operational force multiplier, but also how such preparations gave military forces better strategic choices which, ultimately, allowed these forces to undermine their adversary's strategy.<sup>435</sup> Thus, for Kane, and subsequently Erbel and Kinsey, 'logistics is the arbiter of opportunity'.<sup>436</sup> He states that 'supply preparations not only help determine the character of a war, they are affected by the outcome of that determination.'<sup>437</sup> Thus, logistics preparation and strategic outcome are inherently interlinked, and cause and effect can flow both ways. Crucially, in challenging *Supplying War*'s final assertion that the human intellect cannot fully understand war and thus strategy,<sup>438</sup> Kane argues that not only is logistics preparation an often decisive factor in military operations, but, critically, an understanding of military logistics is the first step toward understanding an adversaries' strategic intent.

Both Van Creveld and Kane also address the potential impact of the RMA on military logistics. Writing in a 2004 post-script to *Supplying War*, Van Creveld correctly identifies how computerisation and JIT logistics allow the fine-tuning of logistics capabilities with operational needs, and how modern armies now negotiate contracts for services on the free market.<sup>439</sup> However, somewhat lazily, he then concludes that there has been no fundamental shift in military logistics since the Second

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<sup>433</sup> Engels, D. (1978) *Alexander the Great and the Logistics of the Macedonian Army*, (Berkeley: University of California Press, 9-10, 23; Lynn, *Feeding Mars*.

<sup>434</sup> Kane, *Military Logistics and Strategic Performance*, 7.

<sup>435</sup> Ibid, 111, 171.

<sup>436</sup> Ibid, 178.

<sup>437</sup> Kane, *Military Logistics and Strategic Performance*, 10.

<sup>438</sup> Van Creveld, *Supplying War*, 237.

<sup>439</sup> Van Creveld, *Supplying War*, 243, 255-7.

World War as the main method of supply is still predominantly based on road transport and intensive industrial modes of production.<sup>440</sup> Indeed, Van Creveld clearly states that: ‘It does not appear as if the nature of logistics has undergone or is about to undergo a fundamental change’.<sup>441</sup> Kane similarly stresses continuity over change in rebutting claims that better information technology will ‘obviate much of [the need for] logistics’<sup>442</sup> and predicts that future forces will need several reliable supply lines to maintain the superior logistics capabilities that confer decisive strategic advantage.

Van Creveld’s position that logistical improvisation, determination and flexibility are decisive certainly has merit: flexibility remains a principle of logistics in NATO militaries.<sup>443</sup> Van Creveld is also correct that most supplies are still shipped by road. Meanwhile, Kane, and Erbel and Kinsey, are correct in arguing that logistical preparation affects strategic performance. And all these authors’ are correct in identifying that the RMA will affect future logistics. However, all these classic works lack a conceptual depth. Van Creveld and Kane lack a theoretical framework for understanding logistical transformation and do not attempt to link this transformation with changes occurring in wider society. Both fail to discuss medical logistics, which are included in Western definitions of military logistics and growing in strategic importance. Decisively, Van Creveld explicitly states that he is unconcerned with ‘any abstract theorising’.<sup>444</sup> As a result, his emphasis on improvisation ignores profound changes to Western logistics systems in the last twenty years. His argument that the modes of production are the same as they were in 1944 is simply incorrect. While Kane’s assessment of the RMA’s impact on logistics is more considered, it leaves open the question of what exactly has changed in the 14 years since his work was published,

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<sup>440</sup> Ibid, 259.

<sup>441</sup> Ibid, 258.

<sup>442</sup> Libicki, M. (1996) ‘The Emerging Primacy of Information’, *Orbis*, 40(2), 261.

<sup>443</sup> Uttley and Kinsey, ‘The Role of Logistics in War’.

<sup>444</sup> Van Creveld, *Supplying War*, 3.

and how this change has occurred. Similarly, Uttley and Kinsey's arguments about the enduring nature of the principles of military logistics have been superseded by events: the US, UK and NATO have all since revised many of their principles in line with the post-Fordist approach.<sup>445</sup>

### **Industrial Logistics and the Origins of Transformation**

While Yoko et al. state that the term logistics emerged out of the Napoleonic post of 'Chief de logis',<sup>446</sup> Rutner et al. argue it first appeared at the time of the American Civil War. Whatever the exact truth, it is clear that the growth of the term is linked with the development of mass armies and the increasingly complex methods of keeping them supplied. In charting the evolution of logistics thought, Rutner et al. posit that while the practice of logistics originated in the military, 'civilian logistics and supply chain management surpassed military logistics at some point after World War II.'<sup>447</sup> This view is supported by John Kent and Daniel Flint, who have examined the business logistics literature to describe the evolution of modern logistics in terms of six key phases. The first phase is farm to market logistics which describes the transfer of goods from point of production to point of sale. By the start of the Second World War, Kent and Flint argue that this era had been largely eclipsed by 'segmented functions' logistics. The primary focus at this time was on the functions that distributed goods, with heavy emphasis on in-bound out-bound transportation, warehousing, wholesaling and inventory control, coupled with a reliance on the combustion engine to produce greater efficiencies.<sup>448</sup> Steven Simon has described this as the Fordist logistics model, based on a static supply chain 'in which the manufacturer contracts with a supplier to

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<sup>445</sup> US Army (2012) *Doctrine Publication 4-0 Sustainment*; Ministry of Defence, *Joint Warfare Publication 4-0: Logistics*.

<sup>446</sup> Yoho et al. 'Defence logistics', 81.

<sup>447</sup> Rutner et al. 'Logistics evolution', 97.

<sup>448</sup> Kent, J. and Flint, D. (1997) 'Perspectives on the Evolution of Logistics Thought', *Journal of Business Logistics*, 18(2), 23.

make and deliver material to the facility, where it is stockpiled.<sup>449</sup> Kent and Flint argue that this era was heavily influenced by the military logistics practices of the Second World War that continued to be utilised by businesses until the early 1960s. Similarly, Rutner et al. see the US Army's use of rear logistics bases in the European theatre (which Van Creveld argued were inefficient) as the 'precursor to the modern distribution centres used by the world's largest firms'.<sup>450</sup> For these authors, military logistics was the source of change in business logistics during this period, thus highlighting the link between the two, and how military logistics was at the vanguard of logistics thought during this period. Crucially, the main body of Van Creveld's analysis of current military logistics is firmly based on evidence from this era and as a result, this is where the utility of his contribution ends.

However, Kent and Flint argue that the era of segmented functions was followed by the development of 'integrated functions' in the early 1960s. This describes the trend toward viewing independent logistics functions holistically as part of a wider, interdependent system. During this period, as the business environment became more dynamic and competitive, there was shift in emphasis from physical distribution to a 'total cost' approach to all parts of the logistics process, with a growing emphasis on information systems, services, marketing, and a wider realisation that one size of product did not fit all. This era coincided with the beginnings of post-Fordist modes of production, and these developments were advanced during the subsequent era Kent and Flint term 'customer focus' in the 1970s and 1980s. This involved a shift in primary focus toward the end user of the product, and toward maximising profits rather than

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<sup>449</sup> Simon, S. (2001) 'The Art of Military Logistics', *Communications of the ACM*, 44(6), 63.

<sup>450</sup> Rutner et al. 'Logistics evolution', 102.

minimising costs.<sup>451</sup> Link node concepts of logistics, and greater emphasis on operations management and management science also emerged during this era.

Supporting this analysis, in *The Box* Marc Levinson shows how the introduction of the 40-foot standardised shipping container from the 1960s onwards revolutionised business logistics and led to the beginnings of globalisation. Moreover, Levinson, and Richard Olson and Thomas Scroggin, note how the US military's adoption of a containerised logistics during the Vietnam War helped solve the problems of supplying over 500,000 soldiers from only one deepwater port.<sup>452</sup> While it must be noted that the quick but partial adoption of containerisation caused serious backlog and wastage issues,<sup>453</sup> Olson and Scroggin show how the subsequent adoption of this simple technology and its accompanying new principles of inventory in-motion, rapid movement, and minimum handling and storage of supplies 'transformed operational planning.'<sup>454</sup> Levinson, and Yoko et al. also argue that the US Navy's insistence on the 40-foot standardised container at a crucial time in its introduction helped cement it as the cornerstone of modern business logistics, while simultaneously contributing to the growth of the Japanese and southeast Asian economies.<sup>455</sup> Thus, these authors show that although business logistics practices led the way during this period, the vast scale and cost of the US military effort in Vietnam meant that the relationship between military and business logistics was bi-directional, with each influencing the development of the other.

With the onset of the eras of 'logistics as differentiator' and 'behaviour and boundary spanning logistics' from the 1980s onwards, the relationship between business

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<sup>451</sup> Kent and Flint, 'Perspectives on the Evolution of Logistics Thought', 24-25.

<sup>452</sup> Levinson, M. (2006) *The Box*, Princeton: Princeton University Press; Olson, R. and Scroggin, T. (1974) 'Containerisation and Military Logistics', *The Journal of Maritime Law and Commerce*, 6(1).

<sup>453</sup> Olson and Scroggin, 'Containerisation and Military Logistics', 30.

<sup>454</sup> Ibid, 134.

<sup>455</sup> Levinson, *The Box*, 183-185; Yoho et al. 'Defence logistics', 85.

logistics and military logistics became uni-directional. The realisation that highly synchronised JIT logistics systems could increase commercial returns first originated in the production practices instigated by the Toyota firm during the mid-late 1970s in response to inflation and a stagnating Japanese economy. Thus, reducing waste – in the form of stocks, workforce, and production times – was the crucial motivator for the introduction of these practices. The basic premise of JIT holds that ‘no product should be made, no component ordered, until there is a downstream requirement.’<sup>456</sup> One of the central tenets of JIT logistics is SCM, which by viewing the procurement, supply and distribution functions as a single system, aims to ‘establish control of end-to-end process in order to create a seamless flow of goods.’<sup>457</sup> By increasing control of the total supply chain, costs can be reduced and profitability increased. With better control, the supply chain is more flexible to respond to changes in demand or supply. Crucially, however, the SCM approach is based on stable assumptions of demand and supply that were a product of the relatively stable strategic and market environment during the Cold War. As a result, SCM systems are dynamically flexible, but ‘only within the set structure of their existing supply chain design.’<sup>458</sup>

Coupled with a greater understanding of the benefits of inter-organisational efficiency and reverse logistics within an increasingly globalised economy, SCM’s cross-functional approach was central to the new JIT logistics procedures that were adopted by other Japanese and US firms in the early 1980s.<sup>459</sup> Meanwhile, rapidly changing customer demands encouraged outsourced production and services to allow firms to respond to the demands of the market.<sup>460</sup> Rutner et al. have also identified how

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<sup>456</sup> Christopher, M. (1998) *Logistics and Supply Chain Management*, London: Pitman, 179.

<sup>457</sup> Christopher, M. and Holweg, M. (2011) “Supply Chain 2:0”: managing supply chains in the era of turbulence’, *International Journal of Physical Distribution and Logistics Management*, 41(1), 63, 69.

<sup>458</sup> Christopher and Holweg, “Supply Chain 2:0”: managing supply chains in the era of turbulence’, 64.

<sup>459</sup> Levinson, *The Box*, 266.

<sup>460</sup> Mentzer, J. et al. (2004) ‘Toward a Unified Theory of Logistics,’ *International Journal of Physical Distribution and Logistics Management*, 34(8), 620.

the deregulation of the transportation industry in the US and a growth in mergers of US firms began the wider trend toward decentralised organisational structures and flatter hierarchies in industry.<sup>461</sup> At the same time, logistics became central to production operations; streamlined and efficient logistics systems became viewed as decisive in conferring competitive advantage. Kent and Flint show that recognition of this principle continues to grow today, and that an understanding of the benefits of co-operation between firms is leading to great inter-firm and inter-functional cooperation and coordination of logistics efforts to increase both efficiencies and flexibility.<sup>462</sup> As demonstrated by some major courier firms' sharing of European distribution centres,<sup>463</sup> boundaries between functions and firms are decreasing as they pool their resources more than in the past. Similarly, the increase in service response logistics and the introduction of performance-based contracts have blended production and servicing functions as never before. The underlying motivation for all these changes is that strategic alliances across the entire supply chain allows organisations to better adjust to changing customer demand whilst limiting costs.

It is therefore clear that modern business logistics has transformed in the last 30 years as the global economy and modes of production have evolved. What is also clear is that the nature of the isomorphic relationship between military and business logistics has reversed, and then been strengthened, since the Second World War. Moreover, as Rutner et al. and Flint and Kent show, there is an identifiable time-lag between the introduction of new business logistics practices, their appearance in business logistics publications, and then their adoption by military logisticians.<sup>464</sup> Thus, since the 1960s Western militaries, isolated from the business world and traditionally protected from

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<sup>461</sup> Rutner et al. 'Logistics evolution', 107-108.

<sup>462</sup> Kent and Flint, 'Perspectives on the Evolution of Logistics Thought', 26.

<sup>463</sup> For example DHL and Deutsche Post.

<sup>464</sup> Rutner et al. 'Logistics evolution', 98, 102; Kent and Flint, 'Perspectives on the Evolution of Logistics Thought', 24.

market competition, have been slower to change their logistics practices than commercial firms.

### **Adaption, Innovation, and the Legacy of Cold War Military Logistics**

During the Cold War, NATO's strategy for deterring Warsaw Pact forces was based around the positional defence of Central Europe. This saw a significant proportion of combat forces based in forward positions in West Germany in order to fight a conventional, high intensity defensive war. These forces were to be supported by reinforcements held at varying degrees of readiness moving to predetermined positions in a 'layer cake' defensive plan, as shown in Figure 1.<sup>465</sup> Significantly, each nation was responsible for the logistics in their own sector, and each sector utilised linear lines of supply. To sustain such large, forward-positioned forces, NATO accepted stock levels were for 30 days of combat supplies. As a result, formations such as 1 British Corps organised their logistics at successive levels using the traditional 'echelon system', with stores held at frontline units, then forward storage sites, then at rear depots and finally larger quantities held in storage in ports such as Antwerp.<sup>466</sup> This structure meant that in the event of hostilities, the main logistics plan was based around the forward movement of stocks, with combat forces' controlled withdrawal along predetermined lines of communication gradually reducing supply lines. NATO's strong understanding of the Warsaw Pact's doctrine and tactics thus shaped its pre-determined defensive plan and its accompanying logistics plan.<sup>467</sup> Moving pre-arranged levels of stock forward at pre-arranged times along secure lines of communication in rear areas meant that there was little need nor desire for complicated asset tracking or inventory management systems, while the logistics structure itself remained functionally segmented with little

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<sup>465</sup> Moore, D. and Antill, P. (2000) 'Where do we go from here? Past, present and future logistics of the British Army', *The British Army Review*, 125, 65.

<sup>466</sup> Moore and Antill, 'Where do we go from here?', 67.

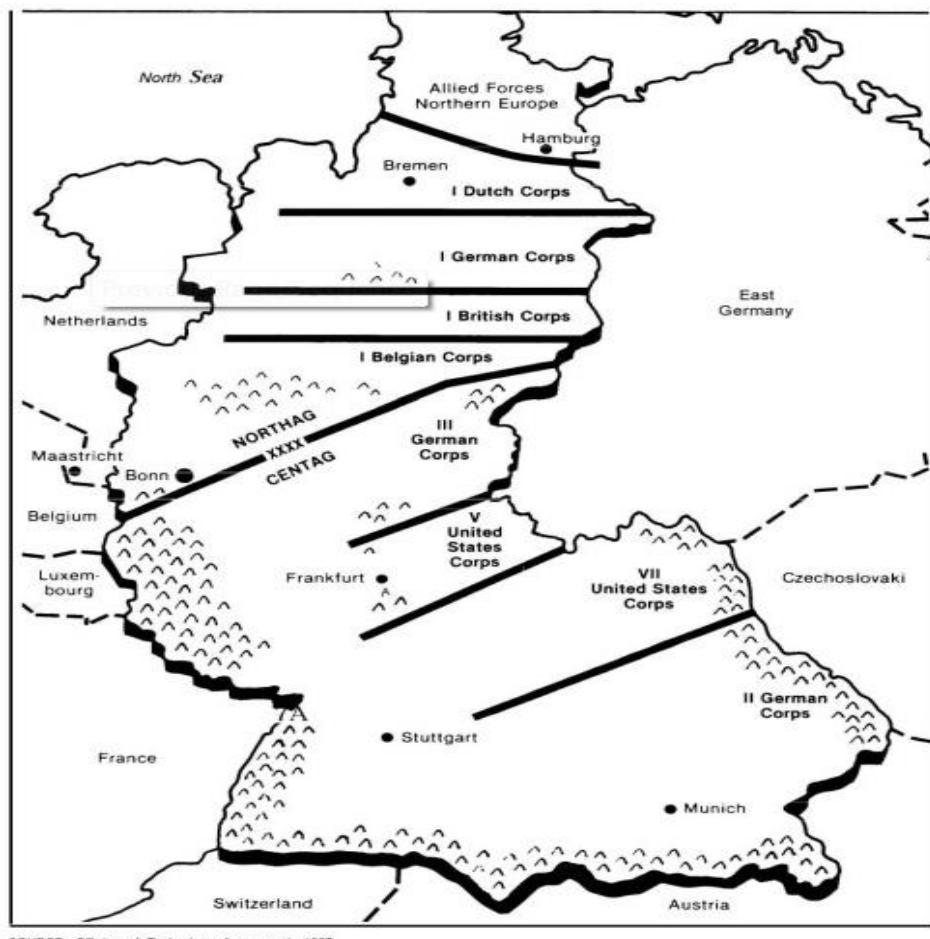
<sup>467</sup> Moore and Antill, 'Where do we go from here?', 67.

integration of resources or joint planning.<sup>468</sup> Indeed, the CGS, General Sir Nick Carter, has eloquently surmised the nature of warfare and logistics at this time:

‘When I grew up in the Cold War, it was straightforward. We were at four hours’ notice to move, we sat in our barracks in Germany, we knew where all our equipment was, we knew where our deployment positions were and we were ready to go for a very clear and present threat that we understood.’<sup>469</sup>

In short, notwithstanding differences in the availability of strategic airlift and force posture, the logistics system of NATO in the Cold War was quite similar to that utilised by the Allies during the European campaign of 1944-5 in that it was predominantly depot and truck-based, and lacking an efficient holistic and systematic approach.

**Figure 1.** NATO ‘layer cake’ defensive plan.



<sup>468</sup> Moore and Antill, ‘Where do we go from here?’, 67.

<sup>469</sup> *The Daily Telegraph* (19 January 2016) ‘Legal action against soldiers ‘could undermine Britain on the battlefield’ warns chief of general staff’, available at <http://www.telegraph.co.uk/news/uknews/defence/12130929/Legal-action-against-soldiers-could-undermine-Britain-on-the-battlefield-warns-chief-of-general-staff.html>, retrieved 28 July 2016.

Despite the end of the Cold War and the introduction of some early post-Fordist practices, Western military logistics in the 1991 Gulf War remained organised around the Cold War echelon system. Although the campaign was expeditionary in nature, the Coalition still could deploy and build up its forces in secure areas away from the frontline in Kuwait. These forces were likewise supplied by secure logistics bases and lines of communication, and the combat operation was directed against a linearly deployed conventional enemy (the Iraqi army) using defensive tactics to hold national territory. Due to this operational reality, the US logistics system operated out of the Saudi port of Jubail, through Al-Qaysumah base, and then moved goods onto divisional logistics bases. To keep the 700,000 US troops supplied, 18 trucks per minute, 24 hours a day, seven days a week passed on the main supply route.<sup>470</sup> Thus at first glance it appears the Cold War model still applied to Gulf logistics.

However, the overarching impression of the US logistics operation given by the officer responsible, Lieutenant General William Pagonis, is of a logistics system innovating and adapting under the pressure of sustaining such large forces in the desert. Contrasting the emergence of RMA combat technologies, Pagonis notes that the lack of asset tracking systems resulted in massive unused stockpiles,<sup>471</sup> while he states that the whole logistics plan and detailed schedule was still recorded in paper format in a single ‘red book’ binder.<sup>472</sup> Pagonis also tells how he had to develop logistics planning cells during deployment to assess logistics requirements, analyse activities and draw up contingency plans, indicating that these cells were an innovation rather than determined by logistics doctrine. Pagonis’ account also indicates the emergence of some post-Fordist thought in Western military logistics at this time. He refers to combat soldiers as

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<sup>470</sup> Pagonis, *Moving Mountains*, 9.

<sup>471</sup> Ibid, 77.

<sup>472</sup> Ibid, 104-106.

his ‘customers’,<sup>473</sup> and also describes how the up-arming of the Abrams tank with the new 120mm gun was achieved by the movement of the entire production line from the US to Saudi Arabia and the adoption of round-the-clock production, thus indicating a growth in contractor flexibility.<sup>474</sup> Similarly, the massive logistical needs of the US Army forced Pagonis to meet demand through local sources where possible. He details how vehicles were mass-rented from Saudi firms by open market negotiation rather than confiscation, noting how the Saudi’s often took advantage of the US Army’s demand to manipulate prices.<sup>475</sup>

The British experience in the Gulf War paints a picture of a military adapting Cold War logistics doctrine to a new environment in a similar fashion to that of the US. The lasting impression given by the commander of British forces, General Rupert Smith, is of a logistics plan that struggled to maintain and supply an armoured division in the Gulf and one that may have not survived contact with a more competent enemy.<sup>476</sup> The British Army’s Gulf logistics plan followed Cold War doctrine in its adoption of echeloned rear bases and three lines of supply to support a linear battle.<sup>477</sup> A single theatre supply area, known as the Force Maintenance Area (FMA) was initially established at Jubail, and supplies were trucked to a Forward Force Maintenance Area (FFMA), and then to a Divisional Maintenance Area for distribution to frontline units along secure lines of communication. Each echelon had their own contingent of engineer, transport, logistics and medical units, and the FMA also had a team dedicated to procuring local supplies and services. Smith notes that he had to battle with the MoD to be given command of the FMA, indicating Cold War planners’ reluctance to allow the force commander to fully integrate strategic logistics with operations. Just in case

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<sup>473</sup> Pagonis, *Moving Mountains*, 8.

<sup>474</sup> Ibid, 8-9.

<sup>475</sup> Ibid, 106-108.

<sup>476</sup> Smith, ‘The Commander’s Role’, 23.

<sup>477</sup> Harber, Colonel W. (1995) ‘The Logistic Structure’ in White, *Gulf Logistics*, 34.

(JIC) logistics was still practiced, with the FFMA stockpiled with enough supplies to sustain the division in combat for at least ten days.<sup>478</sup>

However, the UK logistics effort also suffered from poor inventory and asset tracking procedures, with stores held in depots in Germany since the end of the Second World War frequently missing or unserviceable.<sup>479</sup> Some weapons platforms, like the new Challenger tank and Warrior AIFV required desert upgrades in theatre; a task that was completed with the deployment of specialist teams from the British firms who built them.<sup>480</sup> Meanwhile, the mechanical spares system was ‘overwhelmed’ due to a lack of asset tracking systems.<sup>481</sup> Indeed, asset tracking was a major flaw across British logistics, with a single medical officer forced to examine each container at Jubail in order to find critical medical supplies.<sup>482</sup> Movement control IT systems were also incompatible: in the words of one British logistics officer, this resulted in manual information gathering ‘using stubby pencil, T cards and the most famous... computer of all, fagpacket [becoming] the day to day tool of the mover.’<sup>483</sup> While the use of roll-on, roll-off ships allowed the rapid unloading of supplies, as in Vietnam, the need for internal cranes on these vessels also became quickly apparent given the lack of quayside cranes, as did the need for integral military crane capacity to unload container trucks in land.<sup>484</sup> Similarly, Smith highlights how many ships were loaded to capacity to reduce costs rather than in the order their stores would be needed for operations, thus hampering tactical flexibility.<sup>485</sup>

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<sup>478</sup> White, Major General M. (1995) ‘The Support of the War in Perspective’ in White, *Gulf Logistics*, 9.

<sup>479</sup> Smith, ‘The Commander’s Role’, 20.

<sup>480</sup> White, ‘The Support of the War in Perspective’, 25; Campbell, Colonel A. (1995) ‘Equipment Support’ in White, *Gulf Logistics*, 148, Details the Challenger tank air infiltration system refit.

<sup>481</sup> Campbell, ‘Equipment Support’, 151.

<sup>482</sup> Lillywhite, Colonel L., and Colonel Leitch, R. (1995) ‘Medical Support’ in White, *Gulf Logistics*, 94.

<sup>483</sup> Reehal, Colonel P. (1995) ‘Transport and Movement’ in White, *Gulf Logistics*, 67.

<sup>484</sup> Thompson, Lieutenant Colonel S. (1995) ‘Supply’, in White, *Gulf Logistics*, 121.

<sup>485</sup> Smith, ‘The Commander’s Role’. 20.

Nevertheless, there is also evidence that British logistics was evolving during this period. Smith highlights the utility of logistics liaison officers when fighting in a coalition. He also personally oversaw the development of an armoured reserve logistics battlegroup to negate the dangers of operating on insecure lines of communication once the offensive inside Iraq had begun, a scenario that directly contradicted British logistics doctrine at the time.<sup>486</sup> Meanwhile, new transport technologies, such as the Dismountable Off-Load and Pick-Up System (DROPS) logistics truck also significantly increased the speed and flexibility of British logistics operations.

Although there were some signs of modernisation, the Gulf War highlighted that Western military logistics were still fundamentally based on the echelon system of resupply in secure rear areas and on JIC logistics practices. The same system was followed in the US and UK deployment on NATO's subsequent Balkan missions, and the British deployment in Sierra Leone. Indeed, it appears that the gap between business logistics and military logistics during this period was at its widest, and despite attempts to centralise logistics command, exemplified in the development of the joint-force US Transportation Command (USTRANSCOM) between 1989-2004, functional segmentation remained. There also appears to have been little change in military logistics practices. US and British military logistics organisations had been relatively insulated from organisational change due to a large budget and the need to counter a single, constant existential threat in the Cold War. But by 1999, with shrinking military budgets and the desire for a smaller, more globally deployable military to address increasingly diverse threats, it became apparent that their military logistics systems were far behind the curve. In February 1999 the UK began centralising control of logistics in its new Defence Logistics Organisation, whose main task was to streamline defence

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<sup>486</sup> Smith, 'The Commander's Role', 20.

logistics structure, reduce stock costs and manage procurement reform.<sup>487</sup> The same month in the US, a military commander called for a distribution-based ‘Revolution in Military Logistics’ (RML).<sup>488</sup> Heeding this call, in 2000 Deputy Defense Secretary John Hamre issued a ‘Logistics Transformation Plan’. This called for a total modernisation of US logistics command and practices. In the directive, Hamre stated:

‘Logistics transformation must be rapid... We must drive down our cost (e.g pipeline, maintenance and logistics footprint costs) as we leverage emerging technology to increase the visibility, accuracy, and speed of logistics operations without compromising our effectiveness.’<sup>489</sup>

Despite these prior attempts to reform military logistics in both the UK and US the 2003 Iraq War highlighted major shortcomings in both nations’ logistics systems. These failures became embedded in public perceptions, with headlines such as ‘Families of dead soldiers can sue MoD over inadequate kit’; ‘Lack of helicopters put injured troops at risk’; ‘US soldiers lack best protective gear’ and; ‘Thousands of Army Humvees Lack Armor Upgrade’; indicating media interest in these failures.<sup>490</sup> Reacting to public concern, a House of Commons inquiry into British preparations for the invasion of Iraq noted that as: ‘a result of a combination of shortages of initial stockholdings and serious weaknesses in logistics systems troops at the frontline did not receive sufficient supplies in a range of important equipment including enhanced combat body armour’.<sup>491</sup> A British Commanding Officer during the initial war fighting phase went further, describing the delivery of logistic support to frontline operations as ‘woefully inadequate’.<sup>492</sup> The impact of the failure of unresponsive ‘brute force’

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<sup>487</sup> House of Commons Defence Select Committee (2000) *Second Report: Ministry of Defence Annual Reporting Cycle*, London: HMSO, paras 135-138.

<sup>488</sup> O’Konski, M. (1999) ‘Revolution in Military Logistics: An Overview’, *Army Logistician*, Jan-Feb 1999.

<sup>489</sup> US Department of Defense (2000) *Defense Reform Initiative Directive No. 54 - Logistics Transformation Plans*, Introduction, 2.

<sup>490</sup> *USA Today* (17 December 2003) ‘US soldiers lack best protective gear’; *The Times* (20 October 2012) ‘Families of dead soldiers can sue MoD over inadequate kit’; *The Washington Post* (12 February 2007) ‘Thousands of Army Humvees Lack Armor Upgrade’; *The Guardian* (26 July 2009) ‘Lack of helicopters puts injured troops at risk’.

<sup>491</sup> Ministry of Defence (2004) *Operation TELIC — United Kingdom military operations in Iraq*, London: HMSO, 4.

<sup>492</sup> Yoho et al. ‘Defence logistics’, 85.

logistics based on JIC principles was not only felt by British troops. A US Congress investigation found that in the first month of combat operations, the defense department temporarily ‘lost track of \$1.2 billion in materials shipped to the Army, encountered hundreds of backlogged shipments, and ran up millions of dollars in fees to lease or replace storage containers because of backlogged or lost shipments.<sup>493</sup> Other inefficiencies identified included port congestion, improper sequencing of combat units and their support, excess costs and the disrupted flow of units and supplies into theatre.<sup>494</sup> Clearly, Western military logistics were failing, and the perception was they were failing because they had not adopted industry best practice. As the conflict in Iraq continued, the need for more cost-efficient logistics became increasingly important and both the American and British militaries began to transform their logistics systems in line with post-Fordist principles.

### **Centralisation**

While the presence of neo-liberal governments in both the US and UK who were committed to outsourcing state functions to business is important to understanding the wider drive for military logistics efficiencies,<sup>495</sup> more specifically, the media coverage of early logistical failures in the invasion of Iraq and the resulting political pressure to address the issue ahead of presidential elections forced US Secretary of Defense Donald Rumsfeld to prioritise logistics transformation. In September 2003 Rumsfeld began the process of centralisation, designating the Commander, US Transportation Command (USTRANSCOM) responsible for all distribution across US defence. In defining USTRANSCOM as the Distribution Process Owner (DPO), Rumsfeld ensured it became ‘the single entity to direct and supervise execution of the Strategic Distribution system’ in order to ‘improve the overall efficiency and interoperability of distribution

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<sup>493</sup> *Federal Times* (9 May 2005) ‘DoD Told to Shape Up’.

<sup>494</sup> Simon, ‘The Art of Military Logistics’, 64.

<sup>495</sup> I am indebted to Antoine Bousquets for this insight.

related activities – deployment, sustainment and redeployment support during peace and war.<sup>496</sup> Rumsfeld himself had experience of transforming ailing businesses by streamlining procedures and reducing workforces in line with post-Fordism, and his initiative was informed by his awareness that the entire US defence distribution pipeline needed to be properly linked and synchronised to produce the most cost effective means of supply. In short, it had to emulate private sector logistics. To this end, he designated USTRANSCOM's four-star general as the single, unified commander for all defence distribution, and outlined a four year plan to change organisational structures and upgrade IT systems to give complete oversight of the distribution system. Paradoxically, enabled by centralised and standardised IT systems, the decentralisation of decisions throughout the distribution pipeline encouraged the logistical flexibility to respond quickly to frontline demands.<sup>497</sup> The centralisation and standardisation of logistics practices under USTRANSCOM continued in 2004 when the organisation became the manager of all US defence logistics information technology systems. In 2006 it was made responsible for identifying, recommending and supervising implementation of all global sourcing solutions.<sup>498</sup> Decisively, at this time USTRANSCOM adopted the civilian Supply Chain Operations Reference Model (SCORM) which identifies core institutional processes and tailors production-supply chains to meet these processes.<sup>499</sup>

The British military also increased the pace and scope of centralisation in response to the shortcomings of Iraq. In 2004, the Defence Logistics Transformation Programme (DLTP) was launched with the aim of increasing the effectiveness, efficiency and flexibility of logistics support across UK defence. It appointed a single

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<sup>496</sup> Available at <http://www.transcom.mil/about/briefHistory.cfm> retrieved 20 November 2014.

<sup>497</sup> Smith, B. (2007) 'The Mandate to Revolutionize Military Logistics', *Air and Space Power Journal*, 21(2), 92.

<sup>498</sup> Smith, 'The Mandate to Revolutionize Military Logistics', 97.

<sup>499</sup> Maddox, E. (2005) 'Organizing Defense Logistics: What Strategic Structures Should Exist for the Defense Supply Chain,' unpublished thesis, 5, available at [www.dtic.mil/cgi-bin/GetTRDoc?AD=ADA437047](http://www.dtic.mil/cgi-bin/GetTRDoc?AD=ADA437047), retrieved 4 March 2016.

joint four-star officer, the first Chief of Defence Materiel. The DLTP began the process of centralising defence materiel and resources, and created centralised centres of excellence for the repair and maintenance of major weapons platforms.<sup>500</sup> While the DLTP did increase effectiveness, most notably with the introduction of the centralised JAMES whole fleet management and the VITAL asset tracking systems, it was primarily centred on cost-reducing efficiencies, and, with outsourced support from the McKinsey firm, it eventually delivered savings of £952 million.<sup>501</sup> A renewed focus on effectiveness came with the introduction of the Defence Logistics Programme in 2006. This sought to increase coherence, velocity and precision across logistics through the centralisation of command and control, and the updating and centralisation of IT systems.<sup>502</sup> Emulating the US, 2007 saw the merger of Britain's two defence logistics organisations, the Defence Logistics Organisation and the Defence Procurement Agency, into a single entity, Defence Equipment & Support. Responsibility for operational logistics was also centralised in the Permanent Joint Headquarters J4 division and within the theatre-deployed Joint Force Logistic Component Headquarters.<sup>503</sup> Meanwhile, a single centralised inventory system for the whole of UK defence, the Management of Joint Deployed Inventory (MJDI), was commissioned to provide one platform to link previously incompatible asset tracking systems. MJDI aims at total asset visibility to enable British defence to move to a fully JIT logistics system. It will lead to a profound reorganisation and flattening of hierarchies in British logistics units, and also in a reduction in combat units' logistics personnel, thereby delivering efficiencies. Meanwhile, NATO logistics command has also begun centralising,

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<sup>500</sup> MoD briefing on The Defence Logistics Transformation Programme, available at [http://www.apm.org.uk/sites/default/files/Microsoft\\_Rupert\\_Nichols.pdf](http://www.apm.org.uk/sites/default/files/Microsoft_Rupert_Nichols.pdf), retrieved 29 November 2014.

<sup>501</sup> Ibid, slide 18; McKinsey and Company (2010) 'Supply Chain Transformation Under Fire', available at [www.mckinsey.com/client\\_service/...and.../mog\\_supply\\_chain.ashx](http://www.mckinsey.com/client_service/...and.../mog_supply_chain.ashx), retrieved 29 November 2014.

<sup>502</sup> Leeson, Air Vice Marshall K. 'Multi-National Logistics Transformation – A United Kingdom Update', Briefing available at <http://www.dtic.mil/ndia/2006logistics/leeson.pdf>, retrieved 4 March 2016.

<sup>503</sup> Ministry of Defence (2012) *Joint Service Publication 886: Defence logistics support chain manual*, London: MoD, 6.

although at a much slower pace. In 2011, member states agreed to reduce and reorganise the alliance's logistics structure into the NATO Procurement and Support Agency (NSPA). This combined four former NATO logistics commands into one.

Another major example of ongoing centralisation in British defence particularly pertinent to this study has been the recent implementation of the 'Defence Estate Rationalisation' programme. The 2010 SDSR identified the need for rationalisation of property owned by the MoD in order to save running costs, and primarily recommended the sale of surplus land and buildings that could be undertaken quickly. To achieve this, the Army Basing Plan was announced in March 2013.<sup>504</sup> This plan influenced FR20, which outlined the centralisation of Army Reserve units in larger barracks and the closure and subsequent sale of smaller sites. Of the 334 TA sites around Britain in 2013, FR20 designated 26 to close, most of which were done so on the grounds that the units that occupied these locations were 'under-recruited.'<sup>505</sup> As is discussed in Chapter Six, this sale of some of the defence estate, coupled with the centralisation of equipment stores in larger bases under the Whole Fleet Management approach, has had major impacts on some of the sub-units in this study. Supporting the argument made in the previous chapter, and the evidence provided in the next chapter, this decision was also politico-ideological, reflecting as it did the Conservative government's desire to reduce state spending overall. Indeed, this became especially obvious after they gained a majority in the 2015 general election, and quickly introduced a second round of rationalisation in March 2016. This included the potential sale of ten sites facilitated by relocating of regular units from their barracks into centralised super-garrisons. This marked a major departure from simply selling under-used sites or relocating reserve units, as the 'release' of these sites is expected to generate £1 billion through land sales.

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<sup>504</sup> Ministry of Defence (2013) *Defence Estate Rationalisation Update*, available at <https://www.gov.uk/government/publications/defence-estate-rationalisation-update>, retrieved 28 July 2016.

<sup>505</sup> Hansard 3 July 2013.

It was also designed to complement the Conservative government's house building scheme by contributing 'up to 55,000 homes to support wider Government targets' by 2020.<sup>506</sup> Clearly then, the British government has adopted centralisation in earnest.

### **Integrating the Core and the Periphery**

As in the combat arms, a core, specialised logistics workforce is now being established in Western militaries. Enabled by better training and technology, these core logistics organisations are professionalising the study and practice of logistics. Highlighting a major shift in institutional goals, this new core is increasingly specialising in the management of logistics IT systems and contracting. For example, the US Army's Materiel Command is expanding the training of its cadre of in-service contracting professionals to increase the capability of the Army to understand and engage with its contractors.<sup>507</sup> The establishment of Logistics Contract Management Course run by the Defence Logistics School in Deepcut indicates that British forces are doing the same.<sup>508</sup> In a further sign of professionalisation, the US Army has consolidated previous logistics learning environments with the opening of its own logistics university in 2009. This now runs over 211 different specialised logistics courses.<sup>509</sup> Similarly, the introduction of MJDI in the British Army will be enabled by the specialist support of 262 Combat Service Support Signals Squadron to higher command. The full roll-out of MJDI will change logistics structure at the unit level, with new Logistics Support Detachments (LSDs) embedded with each unit. These detachments will consist of a team of four 'professional logisticians' trained by the RLC, and will replace the old system of each unit providing their own non-specialist logistics staff.<sup>510</sup> Crucially, the smaller LSD core will significantly reduce the number of logistics-related personnel in each unit, and will

<sup>506</sup> Hansard (2016) 'Defence Estate Rationalisation', available at <https://www.parliament.uk/business/publications/written-questions-answers-statements/written-statement/Commons/2016-03-24/HCWS659/>, retrieved 28 July 2016.

<sup>507</sup> Dunwoody, 'Strategic Choices', 84.

<sup>508</sup> British Army (2014) *Tactical Logistics Support Handbook*, para 60.

<sup>509</sup> Available at [http://www.alu.army.mil/ALU\\_ABOUT/ALUHISTORY.htm](http://www.alu.army.mil/ALU_ABOUT/ALUHISTORY.htm), retrieved 6 September 2016.

<sup>510</sup> British Army, *Tactical Logistics Support Handbook*, para 70.

deploy with its parent unit, resulting in significant changes to the way army units are supported. Meanwhile, the, UK, US and NATO have also been careful to maintain core logistics functions deemed central to operational effectiveness. For example, Explosive Ordnance Disposal remains a highly specialised competency that is well funded across these organisations, as represented by the establishment the Counter-IED Centre of Excellence in Madrid, and three other logistics-related centres.<sup>511</sup>

Meanwhile, as part of wider defence cuts, the US and Britain have had to sharply reduce their logistics forces' size whilst attempting to maintain their capability. These cuts have often focused on the logistics component precisely because it is perceived that much of the non-core logistics capability can be provided by a periphery workforce.<sup>512</sup> To reduce costs, many expensive and traditional logistics functions needed during large mobilisations have been allocated to reserve forces, who have simultaneously been increased in size in a bid to maintain capability. For example, while the Army2020 transformation reduced the British Army's logistics personnel by about 30 percent, the complimentary transformation of the Army Reserve forces has increased the reliance on reserve logistics units to deliver the capability to meet surges in demand, and led to the creation of many new reserve logistics units.<sup>513</sup> Indeed, reservists now constitute six of the 13 REME battalions.<sup>514</sup> While the UK's reserve logistics component size has therefore been increased (but not necessarily filled), the capabilities it provides have generally remained toward the lower end of the skill spectrum in their respective fields; for instance, the majority of reserve RLC units are

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<sup>511</sup> Available at [http://www.nato.int/cps/en/natolive/topics\\_68372.htm#](http://www.nato.int/cps/en/natolive/topics_68372.htm#), retrieved 6 September 2016.

<sup>512</sup> For example Future Force 2020 cut the RLC personnel by 25% and engineers by 30%, *The Daily Telegraph* (31 March 2012), 'Britain's most famous regiments spared in defence cuts', available at <http://www.telegraph.co.uk/news/uknews/defence/9178263/Britains-most-famous-regiments-spared-in-defence-cuts.html>; Also *Defense News* (12 June 2014) 'DLA cut by 30%', available at <http://www.defensenews.com/article/20140612/DEFREG02/306120032/Defense-Logistics-Agency-Shrink>, both retrieved 28 July 2016.

<sup>513</sup> British Army, *Tactical Logistics Support Handbook*, para 80; *Future Reserves 2020* para 2.32.

<sup>514</sup> British Army (2013) *Battlefield Equipment Support Doctrine*, 22.

involved in transport and movement. Those units that do have a more specialised function, such as the Operational Support Group which provides a standby core of specialist logistics staff, have been formed with the specific aim of incorporating previous military or civilian skills into reserve capability to reduce costs.<sup>515</sup> As such, the delegation of lower skilled logistics functions to reservists, coupled with the desire to tap the specialised ex-military or civilian workforce, indicates the dualistic nature of modern military logistics structural reliance on the periphery.

However, both the centralisation of command and the division of labour between the core and the periphery have been further accompanied by the near simultaneous adoption of the ‘total cost’ approach to force structure and readiness in Western militaries. The closer integration of the core and the periphery is underpinned by the total cost concept, and SCM practices that strive for the flexibility to respond to consumer demands whilst keeping running costs down. UK defence is currently being re-organised around the ‘Whole Force’ concept that became fully operational in April 2014. This is focused on ensuring that the product – which in the military sense is seen as manpower – consists of ‘the right mix’ of ‘Regulars, Reserves and Contractors to produce the greatest effect in the most cost-effective manner.’<sup>516</sup> For example, the total British deployed force on Operation Herrick in Afghanistan between 2010-2014 consisted of almost 78 percent regulars, nearly 20 percent reservists, and less than 2.5 percent contractors and civil servants.<sup>517</sup> By achieving a more ‘balanced mix’ in the future – itself a term that appears to have originated in the energy industry – UK

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<sup>515</sup> For example, 2 Operational Support Group Royal Logistic Corps provides the capability in the UK.

<sup>516</sup> See briefing by Parkinson, Brigadier R. (2012) ‘Affordability in the International Environment’, available at <http://www.dtic.mil/ndia/2012logistics/Parkinson.pdf>, and Ministry of Defence (2014) ‘How Defence Works’, Version 4.1, page 8, available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/360143/20140930\\_24153\\_How\\_Defence\\_Works.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/360143/20140930_24153_How_Defence_Works.pdf), both accessed 30 November 2014.

<sup>517</sup> Briefing by Director Medical Services, available at [https://www.rusi.org/downloads/assets/Jarivis\\_part\\_2\\_FINAL\\_use\\_this\\_one.pdf](https://www.rusi.org/downloads/assets/Jarivis_part_2_FINAL_use_this_one.pdf), accessed 30 November 2014.

defence planners hope to retain capability and flexibility whilst decreasing expensive manpower costs. The Whole Force concept is enabled by operational planning assumptions, tiered levels of force readiness, and a commitment to better train and equip reserve forces. Indeed, the logistics element, the new Total Support Force (TSF), follows the same approach. The TSF comprises a ‘pre-planned mix of military, civil service and contractor personnel held at appropriate readiness to provide progressive levels of support in the UK and on operations.’<sup>518</sup>

In 2012, the much larger US Army also instigated the ‘Total Force’ policy aimed at better integrating the Army, National Guard and Army Reserve components below the divisional level. Specifically, these reforms standardise reserve readiness with those of the Army, and place responsibility for validating this readiness with Army command.<sup>519</sup> It adopts a standardised deployment schedule across the total force and orders the streamlining of reserve mobilisation procedures. Under analogous fiscal pressures, and following advice from business management firm Price Waterhouse Coopers, the Irish Defence Forces also introduced a ‘Single Force Concept’ in 2012.<sup>520</sup> German, French, and NATO’s defence structures have not yet adopted the concept, predominantly due to ongoing reserve transformation in the case of the former and political issues in the latter two, but the recent adoption of the ‘total cost’ approach by some Western militaries represents a profound change in the way in which not only their logistics, but also their wider military forces, are organised, resourced and deployed. In the US and UK in particular, the change has occurred in a similar time frame due to similar budgetary pressures and strategic appraisals. Crucially, coupled

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<sup>518</sup> British Army, *Tactical Logistics Support Handbook*, para 39.

<sup>519</sup> Secretary of the Army, (2012) *Army Directive 2012-08 Total Force Policy*, available at [http://www.apd.army.mil/pdffiles/ad2012\\_08.pdf](http://www.apd.army.mil/pdffiles/ad2012_08.pdf), page 2, retrieved 30 November 2014.

<sup>520</sup> Irish Department of Defence (2012) *A Value for Money (VFM) Review of the Reserve Defence Force*, available at [http://www.defence.ie/WebSite.nsf/eb9a86f46ada6f4280256c61003e1c58/106441151b85ce4880257abc0059ddc9/\\$FILE/78780999.pdf](http://www.defence.ie/WebSite.nsf/eb9a86f46ada6f4280256c61003e1c58/106441151b85ce4880257abc0059ddc9/$FILE/78780999.pdf) *Value%20For%20Money%20Review%20of%20The%20Reserve%20Defence%20Force.pdf*, retrieved 12 September 2016.

with the centralisation of logistics commands and the division between core and periphery logistics functions, the adoption of the integrative ‘total cost’ approach in Western militaries signals the end of the segmented function logistics of Van Creveld’s era.

### **SCM and Outsourcing**

The success of the total cost approach relies on two decisive criteria being met. Firstly, there must be a comprehensive understanding of demand, and secondly there must be an understanding of how this demand will be met. Forecasting and supply are thus crucial. At the strategic level, Western military logistical demands are set by force structure and strategic appraisals, such as the SDSR and the Quadrennial Defense Review. At the operational level, logistics forecasting is demand-based. This has changed little since the Second World War. However, the supply side has changed dramatically with the introduction of SCM principles and systems into military logistics. Indeed, without the transparency and oversight of supply encouraged by SCM principles, the integrated total force concept would be impossible to implement.

British logistics practices are now heavily dependent on SCM systems. After the 2003 Iraq deployment, the McKinsey consultancy firm was heavily involved in introducing SCM procedures across British defence, with a particular focus on increasing delivery reliability whilst decreasing wait time. Numerous procedural inefficiencies were identified, as was the need to update IT systems. One of the most noticeable changes under the SCM approach occurred in relation to unit stores. Under the previous segmented approach, units held 30 days of stores in contingency. However, by linking existing demand data with engineering analysis and the experience of Quartermasters, standard stores and bespoke ‘priming equipment packs’ are now kept

within the supply chain, giving far more flexibility.<sup>521</sup> Reflecting the desire to move to a wider SCM footing, in 2005 the Joint Supply Chain concept was introduced by the Ministry of Defence to ‘cover the policies, end-to-end processes and activities associated with receipt of stocks from trade to their delivery to the demanding unit and the return loop for all 3 Services.’<sup>522</sup>

Similar changes have been underway in the US. In May 2003, the DoD published its Supply Chain Materiel Management Regulation outlining the conduct of future joint logistics. This regulation introduced SCORM, and at its core was an awareness that US defence logistics needed to be more responsive, reliable and consistent to adapt to the evolving global environment whilst delivering the best value for money. In 2007, the first of three phases in the introduction of SCM, the Joint Supply Chain Architecture was initiated, and in 2010 it was institutionalised.<sup>523</sup> The most recent DoD manual on SCM procedures instructs the military to ‘monitor and adopt or adapt emerging business practices to provide best-value, secure materiel and services, improve DoD supply chain performance, and reduce total life-cycle systems cost.’<sup>524</sup> Industry is therefore clearly seen as in the logistical vanguard in the US. While NATO is yet to adopt a total force structure or a full SCM approach, its logistics updated principles indicate the impact of SCM concepts on its doctrine.<sup>525</sup>

Coupled with the outsourcing of logistics capability to reservists, the British Army’s new Total Support Force puts a similar emphasis on contractors. Crucially, the new TSF structure states that: ‘the use of non-military personnel will [provide] most if

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<sup>521</sup> McKinsey and Company, *Supply Chain Transformation Under Fire*, 54-55, available at [www.mckinsey.com/~media/alumni%20center/.../mog\\_supply\\_chain.ashx](http://www.mckinsey.com/~media/alumni%20center/.../mog_supply_chain.ashx) retrieved 4 March 2016.

<sup>522</sup> Ministry of Defence, *Joint Service Publication 886*, 3.

<sup>523</sup> Fletcher, M. (2011) ‘Joint Supply Chain Architecture’, *Army Sustainment*, 43(3).

<sup>524</sup> US Department of Defense (2014) *DoD Supply Chain Materiel Management Procedures: Operational Requirements*, page 7 enclosure 2, available at [http://www.dtic.mil/whs/directives/corres/pdf/414001m/414001m\\_v0l01.pdf](http://www.dtic.mil/whs/directives/corres/pdf/414001m/414001m_v0l01.pdf) retrieved 30 November 2014.

<sup>525</sup> *NATO Logistics Handbook 2012*, 50-51, available at [http://www.nato.int/docu/logi-en/logistics\\_hndbk\\_2012-en.pdf](http://www.nato.int/docu/logi-en/logistics_hndbk_2012-en.pdf) retrieved 30 November 2014;

not all logistics functions rear of the Theatre Support Group by rule 4 of an enduring operation.<sup>526</sup> Therefore, the British Army's most recent doctrine is to – as much as is possible – delegate rear logistics functions to the private sector by the second year of a deployment. This doctrine also states that reliance on Contractor Support to Operations will increase in relation to the smaller size of the army due to recent cuts.<sup>527</sup> Indeed, British logistics doctrine and procedures now details the different types of contractor support to the TSF, and to codifies the relationship between the army/MoD and contractors.<sup>528</sup> Decisively, it states that early engagement with long-term contractors during operational planning is required, and that contractors should be included in the whole spectrum of these plans, from force generation, to deployment, sustainment and force protection. Meanwhile, there has also been a transformation in the nature of outsourced contracts. With the support costs of complex weapons systems now exceeding the cost of development and production by two to three times over their service life,<sup>529</sup> Andreas Glas et al. have shown that Performance-Based Logistics (PBL) contracts are becoming increasingly common in Western militaries as a method of reducing these costs. For example, PBL can mean that a civilian firm is contracted to deliver a required amount of flying hours on an airframe, rather than hours of servicing.<sup>530</sup> Similarly, in their analysis of outsourced contracts in NATO's mission in Afghanistan, Christiaan Davids et al. show that while member states often conducted independent sourcing, pooled operational sourcing through the former NAMSA structure was also commonly used.<sup>531</sup> The pooling, sharing and prior negotiation of outsourced logistical services in the US, UK and NATO indicates the increasingly

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<sup>526</sup> British Army, *Tactical Logistics Support Handbook*, para 45.

<sup>527</sup> British Army, *Tactical Logistics Support Handbook*, para 38.

<sup>528</sup> Ibid, 18-21.

<sup>529</sup> Glas, A. et al. (2013) 'Performance-based logistics: a portfolio for contracting military supply', *International Journal of Physical Distribution & Logistics Management*, 43(2), 1.

<sup>530</sup> Ibid, 10.

<sup>531</sup> Davids, C. et al. (2013) 'Operational defense sourcing: organizing military logistics in Afghanistan', *International Journal of Physical Distribution & Logistics Management*, 43(2), 125.

privatised nature of military logistics, and adaption to constrained fiscal realities. Meanwhile, the fact that outsourced contractors are now involved in military planning marks a potentially significant change in the relationship between the private sector and the military, while PBL has the potential to change the nature of contractor support to operations in the future.

But the privatisation of logistics on operations has had other profound impacts. Most notably, the deployments in Iraq and Afghanistan saw the largest number of civilian contractors ever used, many of whom operated in comparatively insecure rear areas. The British government has not published extensive data on its use of contractors on operations, but Cusumano reports that in the counter-insurgency phase of the Iraq war the British deployed 8,600 troops and at least 3,500 contractors. Similarly, in 2009, Britain's 9,500 troops in Afghanistan were supported by at least 6,500 MoD contractors, and this may have peaked at 10,000.<sup>532</sup> Thus contractors contributed at least 40 percent of Britain's total force in both Iraq and Afghanistan. As Cusumano notes, the British reliance on contractors was politically useful as it meant troop caps could be circumvented in these unpopular wars.<sup>533</sup> For its part, in 2007 the US military employed 180,000 contractors either directly or indirectly in Iraq, while it had 160,000 troops in theatre.<sup>534</sup> Of these contractors, 21,000 were American, 43,000 foreign and about 118,000 Iraqis.<sup>535</sup> While the US use of contractors for logistics 'beyond the last mile' was also partly caused by the political desire to limit force size in Iraq, both its and the UK's case nonetheless underscores the massive privatisation of military logistics. Meanwhile, the fact that the second and third largest winners of US contracts in Iraq were both Kuwaiti firms,<sup>536</sup> and that General David Petraeus had to re-organise local

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<sup>532</sup> Cusumano, 'Bridging the Gap', 107-108.

<sup>533</sup> Cusumano, 'Bridging the Gap', 111.

<sup>534</sup> *The Los Angeles Times* (4 July 2007) 'Private Contractors Outnumber US Troops in Iraq'

<sup>535</sup> Sheverak, 'The Globalisation of Military Logistics', 57.

<sup>536</sup> 'And The Winner For The Most Iraq War Contracts Is...'.

contracting in Afghanistan due to corruption allegations,<sup>537</sup> highlight not only that modern Western militaries have emerged as economic powers in their own right, but also a growing realisation that the awarding of contracts to local suppliers can aid or undermine reconstruction and economic growth depending on how it is conducted. In modern conflicts, military logistics practices – previously undertaken predominantly by military forces – can now be incorporated into plans to enable strategic outcomes through their generation of economic activity. Similarly, Western militaries, no longer confined to sourcing nationally, have demonstrated their ability to leverage the globalised economy through outsourcing with major implications for Western strategy.<sup>538</sup>

### The Emerging Logistics Network

Very recently, the focus on the supply chain has been replaced by the realisation that more networked logistics will be a crucially important enabler in future conflict. Indeed, even before the introduction of JIT and SCM, US commanders were aware that the ultimate goal of these processes was a ‘seamless logistics system that ties all parts of the logistics community into one network of shared situational awareness and unified action’.<sup>539</sup> As its latest logistics doctrinal publication, Joint Defence Publication 4.0 (JDP 4.0) indicates, the British military is now taking steps to move beyond SCM by creating a fully networked logistics system which encompasses more than just the supply chain. Highlighting this, according to one senior officer responsible for transforming British Army logistics, ‘networking is the new buzzword’.<sup>540</sup> As JDP 4.0 states, ‘Logistics stretches across a network of nodes with multiple processes, through

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<sup>537</sup> *The Boston Globe* (30 July 2010) ‘Petraeus takes on Afghan Corruption’, available at [http://www.boston.com/news/world/asia/articles/2010/07/30/petraeus\\_takes\\_on\\_afghan\\_corruption/](http://www.boston.com/news/world/asia/articles/2010/07/30/petraeus_takes_on_afghan_corruption/) retrieved 4 March 2016.

<sup>538</sup> Erbel and Kinsey, ‘Think Again’, 21.

<sup>539</sup> Reimer, J. (1999) ‘A Note from the Chief of Staff of the Army on the Revolution in Military Logistics’, *Army Logistician*, Jan/Feb.

<sup>540</sup> Interview, senior British Army logistics officers responsible for future doctrine, Andover, 9 June 2015.

which personnel and materiel flow and services are provided'.<sup>541</sup> Thus, the whole British military and accompanying international logistics system is now conceptualised as a 'support network' of interconnected nodes of suppliers, consumers, maintainers and storers. This network approach seeks to eclipse SCM by moving beyond the supply chain to a more expansive view of all supporting producers, services, and partners whilst simultaneously allowing supplies to be moved 'forward and backward and sideways' between nodes. Rather than only moving supplies forwards toward the end user: 'the network spreads the load' associated with potentially stove-piped supply chains by allowing storage within its nodes, thereby reducing logistic drag.<sup>542</sup> Contrasting the logistics overlay of NATO's 'layer cake', Figure 2 clearly shows that in a globalised world, it is recognised that the British military's supply network itself must be global. This new network must also be enabled by better information technology, with JDP 4.0 stating that:

'Network enabled capability for Logistics enhances logistic information usage by providing and managing information in a timely and secure manner. The capability enables better decision-making. Network enabled capability for logistics is potentially a force multiplier and should form a fundamental element of logistic operational planning.'<sup>543</sup>

However, this network-enabled capability must be supported by ever more complex IT systems with open architecture across nodes – a situation which is yet to be reached. Moreover, to be effective, a fully networked system also needs accurate consumption and environmental data which is largely missing at present. Thus, at present, the British Defence Support Network is still under development; it is not yet a fully networked strategic supply system.

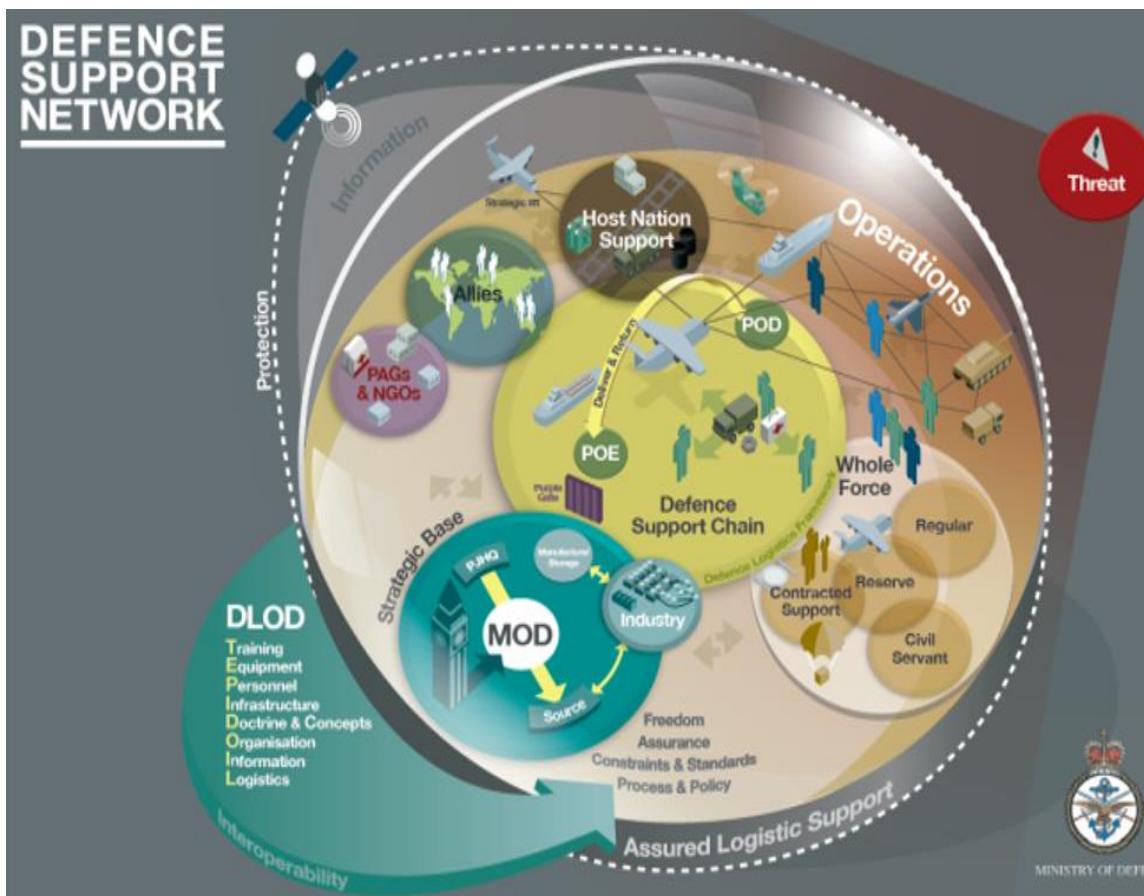
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<sup>541</sup> Ministry of Defence, *Logistics for Joint Operations*, 9.

<sup>542</sup> Ibid.

<sup>543</sup> Ibid, 30.

**Figure 2.** The British Defence Support Network



Nevertheless, the introduction of the MJDI and Total Asset Visibility Minus (TAV-) systems across British defence is another good example of an emerging logistics network. A major part of the Logistics Networked Enabled Capability programme and the Future Logistics Information Services project, MJDI will replace the stockpiling and stove-piping associated with segmented function logistics across all units and formations, leading to a truly networked logistics IT system. MJDI will allow for the total global visibility of all stock up to unit level, and therefore better asset management. It will also be interoperable with the new TAV- which uses tagged barcodes on vehicles, containers and pallets that can be read by radio frequency up to 100 metres from where they are located. This allows the automatic logging of all stores and supplies as they pass through TAV- nodes, in stark contrast to the experience of the Gulf and Iraq Wars. This visibility, linked with the MJDI system, will allow demand to

be judged in near real-time, and allow logistics planners to move stocks from one unit to another based on priorities and requirement data within the system, rather than solely on the demands of the units.<sup>544</sup> Crucially therefore, by ‘turning every unit into a secondary depot’,<sup>545</sup> MJDI will create a distribution network across British defence, with every node in the network able to see what is in the system and where it is at any time. Compared to the segmented functions system, MJDI has the potential to completely transform both the structure and procedures of British defence logistics, bringing them in line with business best practice.

An interesting example of the emergent network approach to operational-level logistics is the US-led creation of the Northern Distribution Network (NDN) to supply the Afghanistan surge of 2009. The NDN was established for mainly geopolitical reasons as the traditional method of supplying forces in Afghanistan using the Karachi-Khyber Pass-Kabul route was vulnerable to both attack by insurgents and thieves, and closure by the Pakistani authorities. Moreover, in early 2009 up to 90 percent of US military surface cargo moved via Pakistan,<sup>546</sup> with the insurgents involved in lucrative rackets in Karachi and often paid by NATO contractors to let their convoys through. To diversify its supply route, after a series of diplomatic initiatives in 2009 the US and NATO began using the most commonly used route of the NDN, which ran by rail from Baltic ports, through Russia, Kazakhstan, and Uzbekistan to the northern Afghan border. Supplies were then loaded onto trucks and driven to Mazar-e-Sharif and via the treacherous Salang Pass into Kabul. Another branch of this route ran further east, through Kyrgyzstan, Tajikistan, and into Kunduz. In total, these routes involved US shipping firm Maersk, various Baltic and Russian railway operators, and numerous

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<sup>544</sup> British Army, *Tactical Logistics Support Handbook*, paras 65-69.

<sup>545</sup> British Army, *Tactical Logistics Support Handbook*, para 71.

<sup>546</sup> *The Washington Post* (2 July 2011) ‘U.S. turns to other routes to supply Afghan war as relations with Pakistan fray’, available at [http://www.washingtonpost.com/world/national-security/us-turns-to-other-routes-to-supply-afghan-war-as-relations-with-pakistan-fray/2011/06/30/AGffLYvH\\_story.html](http://www.washingtonpost.com/world/national-security/us-turns-to-other-routes-to-supply-afghan-war-as-relations-with-pakistan-fray/2011/06/30/AGffLYvH_story.html), retrieved 4 March 2016.

haulage companies in Uzbekistan, Kyrgyzstan, Tajikistan and Afghanistan, as well as the establishment of US logistical bases in many of these countries. A second shorter, southerly NDN route later opened that ran from the Georgian port of Poti, via Baku, Azerbaijan, the Caspian Sea, Turkmenistan and Uzbekistan before arriving at the Afghan border at Termez. Another route ran via Mongolia, creating a more robust network of supply lines into Afghanistan by 2012 (see Figure 3). Indeed, such was the scale of the NDN that some policymakers proclaimed the logistical network as ‘a modern Silk Road’ that would bolster local trade through local purchases whilst increasing Western influence in the region.<sup>547</sup>

The benefits of a network approach to supplying forces in Afghanistan was highlighted in November 2011 when the Pakistani government forbade NATO supplies from entering its territory after a number of its soldiers were killed in NATO airstrikes. As a result, by February 2012, 85 percent of NATO fuel supplies and over 40 percent of non-lethal stocks were entering Afghanistan via the NDN.<sup>548</sup> However, while the NDN offered logistical continuity and flexibility, this came at a price: by January 2012 it was costing the Pentagon an extra \$87 million per month to supply via the NDN rather than through Pakistan.<sup>549</sup> Moreover, the fact that the operational supply network was spread across former Soviet countries caused their own logistical and geo-political problems. For example, most participating nations specified that all cargoes consisted of non-lethal supplies, leaving lethal cargoes to be flown through Russia. Following US forces’ eviction from Uzbekistan’s Karshi Khanabad airbase in 2005 for US criticism of President Islam Karimov, the US outsourced logistics at the country’s Navio cargo

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<sup>547</sup> Center for Strategic and International Studies (2009) *The Northern Distribution Network and the Modern Silk Road*, Washington: CSIS.

<sup>548</sup> *Stars and Stripes* (19 January 2012) ‘Costs soar for new war supply routes’, available at <http://www.stripes.com/news/costs-soar-for-new-war-supply-routes-to-afghanistan-1.166358> retrieved 4 March 2016.

<sup>549</sup> *Ibid.*

airport to Korean Air, as this was more politically acceptable to both sides. Simultaneously, Uzbek Airways signed a commercial contract to fly northern European

**Figure 3.** The Northern Distribution Network



NATO member states' supplies into Afghanistan.<sup>550</sup> In June 2012, protests erupted in Ulyanovsk after Russian Prime Minister Dmitry Medvedev signed a decree allowing NATO to use a nearby airbase nearby as a transit hub, and the base was never used.<sup>551</sup> Similarly, Uzbek and Kyrgyz officials complained about the poor economic impact of the NDN. Indeed, a 2011 US Senate report stated that of the \$40 million the US had spent on local goods in NDN countries since 2010, 51 percent was purchased in

<sup>550</sup> Eurasianet (10 May 2009) 'Uzbekistan: Karimov Gives Washington the Air Base it Needs for Afghan Operations', available at <http://www.eurasianet.org/departments/insightb/articles/eav051109a.shtml> retrieved 4 March 2016.

<sup>551</sup> UPI (29 June 2012) 'Russia approves plan for NATO base', available at [http://www.upi.com/Top\\_News/Special/2012/06/29/Russia-approves-plans-for-NATO-base/UPI-55941340977755/](http://www.upi.com/Top_News/Special/2012/06/29/Russia-approves-plans-for-NATO-base/UPI-55941340977755/), retrieved 4 March 2016.

Kazakhstan, 39 percent in Georgia and only 9 percent in Uzbekistan, indicating major disparities in economic benefits compared to each countries' strategic position.<sup>552</sup>

Clearly, the network approach to logistics gave the US and NATO a robust and flexible supply route in Afghanistan, and represented a major change from using single theatre entry points to supply forces. However, in keeping its forces supplied in a distant, landlocked country, surrounded by states outside their traditional sphere of influence, US and NATO logistics were at the mercy of geo-politics. This marked a fundamental difference to logistics in previous conflicts. While both the US and NATO did possess strategic air lift capabilities that could bypass the NDN, the cost of air freight, at \$14,000 per ton, was prohibitively expensive for all but the most vital of cargoes.<sup>553</sup> This indicates that if expeditionary campaigns fought in isolated and geographically diverse locations increase, the traditional single lines of supply through allied or host nations will face both growing geopolitical and cost pressures. However, given the commercial nature of modern transnational logistics networks, geo-politics is not always decisive in determining their success. It is noteworthy that although NATO and Vladimir Putin's Russia suspended almost all co-operation in the wake of the Ukrainian crisis, the NDN continued to operate at full capacity as NATO forces back-loaded supplies and equipment from Afghanistan.<sup>554</sup> It is perhaps telling that the business benefits of modern military supply can trump geo-political rivalry.

### **Innovation and Adaption: FOBs and CLiPs**

While it is therefore clear that a major change in the way military logistics is structured and managed at the strategic and operational levels has occurred, there is also evidence

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<sup>552</sup> US Senate Committee on Foreign Relations (19 December 2011) *Central Asia and the Transition in Afghanistan*, , available at <http://www.foreign.senate.gov/imo/media/doc/71639.pdf>, retrieved 4 March 2016.

<sup>553</sup> CNN (29 November 2011) 'To Afghanistan, on the slow train', available at <http://edition.cnn.com/2011/11/29/world/asia/afghanistan-military-railroad/> , retrieved 4 March 2016.

<sup>554</sup> Eurasianet (18 August 2014) 'Putin: We're Not Going to Block U.S Military Transit', available at <http://www.eurasianet.org/node/69601>, retrieved 4 March 2016.

to suggest that Western military tactical logistics practices have adapted to the modern battlefield. As the conflicts in Iraq and Afghanistan have been defined by insurgencies operating in predominantly non-linear battle spaces, Western forces increased their reliance on the Forward Operating Base (FOB). Although the FOB concept itself dates back to the British Army's isolated imperial outposts, faced with unconventional insurgent tactics that emphasise surprise attacks from within the population – often on unsecured supply routes – Western militaries resorted to static, forward, defendable bases in recent expeditionary conflicts. Given the lack of clear frontlines between opposing forces, the FOB system relied on supply from theatre bases, such as Shaibah Logistics Base in Iraq, or Camp Bastion in Afghanistan, which were heavily defended and preferably sited far from the population. However, this meant that – unlike in the rear areas of linear battlespaces – these bases could not take advantage of existing infrastructure, such as water, electricity and roads, and were often situated far from the FOBs. As a result, these bases had to create their own water, energy and fuel infrastructures, and although supplying smaller forces, the logistical burden was therefore greater. Indeed, one British logistics officer has described the task of constructing Camp Bastion, the largest logistical base since the Second World War, as similar to building ‘Aldershot with Gatwick [airport] bolted on... in the face of a lethal insurgency in a landlocked country.’<sup>555</sup>

Due to similar tactical pressures, beginning in Iraq, and most notably in Afghanistan, the system of FOBs and smaller COBs (combat outposts) significantly altered both operational and logistical plans. Erbel and Kinsey have also noted the logistics problems in the Helmand campaign, but did not discuss the FOB supply system in detail.<sup>556</sup> Robert Egnell and Anthony King have both examined how the British ‘ink-dot’ operational plan relied on FOBs to disperse limited forces across large,

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<sup>555</sup> *The Sunday Times News Review* (2 November 2014) ‘We Think It’s All Over’.

<sup>556</sup> Kinsey and Erbel, ‘Think Again’, 17.

unsecured areas of Helmand province.<sup>557</sup> While these provided a defendable and secure base for troops in often highly volatile areas, most of the FOBs were unable to mutually support one another. Coupled with this, vast areas, including main supply routes, could not be adequately secured with the small forces involved. While the British FOB-based operational approach in Helmand has been heavily criticised,<sup>558</sup> Leonard Wong and Stephan Gerras have argued that with the insurgent threat seemingly everywhere and nowhere, the safety of the FOB, with its better food, chance of rest and its provision of technologies to communicate with families, has changed Western soldiers' experiences of war.<sup>559</sup> Yet precisely because of the supplies needed to feed and defend a FOB, and the services expected in them, the FOB has created its own logistical challenges.

Most obviously, the FOB system resulted in the flattening of the conventional hierarchical echelon logistics system with secure supply lines, which was largely replaced by a more nodal method of resupply. For example, while a company in a FOB would usually first request re-supply from its own chain of command, the fact that almost all commands and their respective stores were usually co-located in the main theatre base, rather than at different points in an echelon, meant that it was usually quicker and easier to receive supplies compared to the old echeloned system. This centralisation of logistics command and stores in theatre was also accompanied by a centralisation of the means of delivery. Despite Van Creveld's assertion that helicopters were unlikely to affect logistics due to their cost,<sup>560</sup> support helicopters were frequently pooled between different nations and commands at bases to provide greater re-supply capacity and flexibility. Re-supply road vehicles were frequently co-located as well.

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<sup>557</sup> Egnell, R. (2011) 'Lessons from Helmand, Afghanistan: What now for British Counterinsurgency', *International Affairs*, 87(2); King, A. (2010) 'Understanding the Helmand campaign: British military operations in Afghanistan', *International Affairs*, 86(2).

<sup>558</sup> Egnell, 'Lessons from Helmand, Afghanistan'; King, 'Understanding the Helmand campaign'.

<sup>559</sup> Wong, L. and Gerras, S. (2006) 'CU @ The FOB: How the Forward Operating Base is Changing the Life of Combat Soldiers', Washington: Strategic Studies Institute, 25.

<sup>560</sup> Van Creveld, *Supplying War*, 256.

Instead of supplies travelling up one unit's echelon system, often a single logistics convoy dropped supplies off at a series of different units in different FOBs before returning to the main logistics base. Although the basic principles remained the same,<sup>561</sup> in Afghanistan nodal logistics distribution replaced the linear echeloned supply system.

While the use of support helicopters to re-supply FOBs is an obvious method of negating insurgents' use of Improvised Explosive Devices (IEDs) and small arms attacks on logistics convoys, it remains one of the most expensive means of logistics delivery. As a result, traditionally lightly-armed logistics convoys have vastly increased their firepower whilst simultaneously up-armouring.<sup>562</sup> This has led to what could be termed the 'combatification' of tactical logistics in modern conflicts, highlighted by the increasing use of Combat Logistics Patrols (CLPs). Known colloquially as 'clips', CLPs have become enshrined in British logistics doctrine as the favoured method of operating in insecure areas.<sup>563</sup> These convoys can stretch for miles and often consist of over 200 heavy vehicles travelling distances of up to 200 kilometres through insurgent territory.<sup>564</sup> Vehicles usually consist of up-armoured military trucks like the new, crane-equipped British MAN Supply Vehicles, accompanied by other specialist logistics vehicles such as the OSHKOSH series of transporters. For force protection, these vehicles are now accompanied by the heavily armed and armoured MASTIFF or MRAP protected mobility vehicles, containing fighting troops. At the head of the convoy, an anti-IED roller vehicle can be used to detonate pressure plate devices. Tanks and AIFVs can also accompany the convoys. This upscaling for combat has not only clearly

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<sup>561</sup> Interview, senior British Army logistics officers responsible for future doctrine, Andover, 9 June 2015.

<sup>562</sup> British Army, *Battlefield Equipment Support Doctrine*, 10.

<sup>563</sup> British Army, *Tactical Logistics Handbook*.

<sup>564</sup> British Army (2010) 'The Biggest Combat Logistics Patrol Ever in Afghanistan' and British Army (2012) 'Week-long patrol resupplies Musa Qal'ah', available at <https://britisharmy.wordpress.com/2010/05/18/the-biggest-combat-logistic-patrol-ever-in-afghanistan/> and <http://webarchive.nationalarchives.gov.uk/20121026065214/http://www.mod.uk/DefenceInternet/DefenceNews/MilitaryOperations/WeeklongPatrolResuppliesMusaQalah.htm> both retrieved 4 March 2016.

transformed supply operations, it has affected the training and posture of logistics soldiers who now may need to fight their way through to FOBs. In Afghanistan, the tactical threat forced Western militaries to quickly procure these vehicles in large numbers and at considerable cost, but it also altered the nature of combat operations in the FOBs themselves. With CLPs occurring every week to keep FOBs supplied, the few available combat troops were frequently detailed to secure the main supply routes for hours each time the convoys passed.<sup>565</sup> Such was the money, time, and lives expended on resupplying the FOBs that, to paraphrase Clausewitz, in many respects ‘it was as if whole [British] war-engine had ventured into the enemy’s territory in order to wage a defensive war for its own existence.’<sup>566</sup> Complimenting Wong and Gerras, others have identified the increasing logistical demands of modern RMA-equipped militaries, with Erbel and Kinsey in particular detailing how logistics constrained British operational choices in Afghanistan.<sup>567</sup> This is on such a scale that the tail can wag the dog, with profound implications for tactical, operational, and ultimately strategic flexibility.

## Conclusion

This chapter has shown how the current dominant mode of production, post-Fordism, is a useful conceptual framework for explaining recent military logistics transformation. In doing so, it is clear that in emulating business practices, the UK, US and NATO have transformed their logistics doctrine, systems and procedures since the Gulf War. Military logistics has been commercialised and civilianised through the processes of centralisation; integrating the core and the periphery; outsourcing and SCM; and the emergent logistics network. Enabled by advances in technology, these processes continue to occur, often at different paces and to different extents across these militaries, but all following broadly similar goals and trajectories. I would contend the

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<sup>565</sup> Bury, P. (2010) *Callsign Hades*, London: Simon and Schuster, 237-9.

<sup>566</sup> Van Creveld, *Supplying War*, 28.

<sup>567</sup> Erbel and Kinsey, ‘Think Again’; Shouesmith, ‘Logistics and Support to Expeditionary Operations’.

cumulative effect of each of these processes has resulted in the most profound change in military logistics since the introduction of the combustion engine. Furthermore, with the adoption of the whole system approach to both military logistics and wider military forces, it is clear that the potential impact of each process is heavily dependent on the introduction of the others; for example, centralisation enables networks, networking can enable outsourcing capacity. As a result, the whole systems approach is creating a logistics system, but also a wider force structure in the West, that relies on high levels of integration to generate the most efficient capability from smaller organisations within tighter time frames. This transformation has important implications for both the military logistics literature and the future of military logistics itself.

It is patent from this analysis that one of Van Creveld's central arguments – that improvement in military logistics is impossible – is incorrect. That the British and US militaries have improved the efficiency and responsiveness of their logistics, especially since 2003, is clearly evident. His other major assertion that improvisation is the fundamental characteristic of successful logistics ignores the major impact that meticulously planned, long term IT systems, new contracting, outsourcing and core-periphery approaches are having on modern logistics. Even Van Creveld's last remaining credible assertion – that forces still rely on supply from the rear and trucks to bring these to the front – has been and will continue to be eroded by the introduction of new technologies, the dispersal of combat forces, and the networked and nodal logistics system that is likely to be required to support them. As much as Van Creveld has given to the study of military logistics, this author would contend that such is the nature of recent logistics transformation that much of *Supplying War* is now out of date and conceptually flawed.

Following Demchak's and Farrell's work on combat forces, it is clear that the British and US militaries have closely emulated business best practices in transforming

their logistics. Following Grissom and Foley et al., it is also clear these top-down emulations of civilian business logistics have been accompanied by bottom-up tactical adaptions. FOBs and CLiPs demonstrate how British forces' logistics have also transformed to meet the conditions of the modern battlefield. Thus, the transformation literature appears to hold across military functions. More broadly, Western militaries' adoption of post-Fordist principles has interesting implications for the future. For one, new technologies such as swarm delivery drones, 3-D printing, high velocity distribution from mobility balloons, automated convoys and robotic delivery systems, to name but a few, are likely to further 'challenge the paradigm of the truck'.<sup>568</sup> The RML will continue to evolve with technology and strategic circumstance. Important evidence of this is provided by the recent re-evaluation of military logistics principles in Britain, the UK and NATO. For its part, the British Army is currently juggling how to logistically plan for future expeditionary contingency operations and the possibility of major interstate conflict, whilst simultaneously reducing costs and building robust networks with its industrial base to provide a potentially strategic edge.<sup>569</sup> Emphasising this point, General Carter recently stated that 'the reality is that we can deliver military capability differently if we do so in partnership with industry.'<sup>570</sup>

At the operational level, the future operating environment that the British Army is preparing for will likely involve 'contingency at distance' – the initial rapid deployment of a battlegroup-sized force into an uncertain environment at the end of a potentially stretched supply chain/network.<sup>571</sup> While the focus on the divisional level discussed in Chapter Nine does raise questions as to whether an echelon system would

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<sup>568</sup> Interview, senior British Army logistics officers responsible for future doctrine, Andover, 9 June 2015.

<sup>569</sup> General Nick Carter, comments at Chatham House on 'Future of British Army', (17 February 2015), available at <https://www.chathamhouse.org/event/future-british-army-how-army-must-change-serve-britain-volatile-world>

<sup>570</sup> Gen Nick Carter, comments at Chatham House on Future of British Army, 17 Feb 2015, available at <https://www.chathamhouse.org/event/future-british-army-how-army-must-change-serve-britain-volatile-world>

<sup>571</sup> Interview, senior British Army logistics officers responsible for future doctrine, Andover, 9 June 2015.

be adopted again during a major inter-state war, the fact that states like Russia increasingly operate ‘in the grey’ area between conflict and peace would suggest that there is unlikely to be a full return to the days of safe rear zones behind clearly defined front lines. Like insurgency, hybrid forms of warfare will pose a major risk to rearward supply lines, requiring road resupplies to be equipped to fight whilst also driving the introduction of some of the new delivery technologies stated above. The increasing dispersal of ground forces in response to new technologies will likely further contribute to this. Indeed, the British Army’s recent Joint Force 2025 plan to create two ‘Strike Brigades’ capable of deploying ‘rapidly over long distances’ and of ‘sustain[ing] themselves in the field’ (itself a nod to the successful French intervention in Mali), also implies a light logistical footprint enabled by new technologies, contractors, and perhaps a greater reliance on local sourcing, rather than a return to the echelon system.<sup>572</sup> Thus, while the wider logistics principles underpinning the echelon system may remain, they will likely continue to inform distributed logistics. Distributed, nodal, logistics seems here to stay. Thus, CliPs and FOBs are unlikely to be historical anomalies, especially as the more resilient defence support network materialises. Conversely, adaptability and flexibility are likely to become even more important as new threats and technologies emerge. Despite the importance of new logistics concepts and systems, it must be stressed that the principles of foresight; agility; cooperation; efficiency; and simplicity underpinning British tactical logistics are also unlikely to change.<sup>573</sup> Indeed, notwithstanding the introduction of MJDI and the adaption of FOBs and CliPs, as is discussed in Chapter Eight, at the tactical level many logistics practices have been relatively untouched by post-Fordism, which as this chapter has shown, has predominantly transformed logistics management and structures.

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<sup>572</sup> National Security Strategy and Strategic Defence and Security Review, 10, 6.

<sup>573</sup> British Army, *Tactical Logistics Handbook*, 11.

Crucially, however, the structure in which FR20 has been affected, through a complex, outsourced, rotational system, is a profoundly post-Fordist solution to these old problems. This restructuring of Britain's land forces around what academics have termed post-Fordist principles also raises interesting strategic implications. As will be discussed in the next chapter, by adopting the 'Total Cost' approach to solve the demands of less supply of, but potentially equal or greater demand for, ground forces, the plans' leveraged nature means that it lacks the structural flexibility to respond to strategic shocks. Army2020's rotational system is simply not designed to deal with these kind of shocks; there is very little slack in the system at present, certainly not enough to allow the army to conduct two simultaneous medium-sized operations, as it did in Iraq and Afghanistan between 2006-2009, nor crucially, to conduct division-plus operations.<sup>574</sup> It is arguable therefore that Army2020 is based on the central strategic assumption that there will be enough warning time before a major conflict that requires an army of hundreds of thousands, rather than tens of thousands, of troops. To generate a force this size would require conscription, and these conscripts would likely be trained by cadres of regulars not engaged in fighting.<sup>575</sup> In this context, similar to Haldane's plans, the Army Reserve would likely reinforce the rest of the regulars to buy time for conscripts to be trained. In Lamb's opinion, it is for this reason that the reserve component remains potentially very important: 'What the reserve gives you which the regular cannot do is scale... so if you've got the need to enlarge on the unexpected, truth of the matter is, scale sits with a reserve, not the regulars.'<sup>576</sup> As such, at the strategic level, Army2020 and FR20 are, by their very design, limited. Even with the integrated reserves component, and the availability of an ex-regular reserve of 35,000 troops with

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<sup>574</sup> Comments by Lord Dannatt, Global Strategy Forum, 14 July 2015.

<sup>575</sup> Interview, Lamb, 13 July 2015.

<sup>576</sup> Ibid.

three years' experience,<sup>577</sup> Army2020 essentially provides a core around which a much larger conventional army required for national defence could consolidate. Decisively, it offers the potential for cheap, scalable mass. Interestingly, this indicates an acceptance of the benefits of a more Fordist mode of generating military capability in the event of a national emergency. Indeed, it appears that the British military are cognisant of the limits of post-Fordist-based force structures.

However, supporting Demchak, at the strategic level, the adoption of JIT processes and the accompanying SCM approach in military logistics has potentially profound consequences for the West. Kane has presciently noted that while JIT 'may be a useful slogan for business management... it is a dangerous philosophy for defence.'<sup>578</sup> While JIT procedures are cost effective and efficient, operational effectiveness is the final and deadly standard against which military logistics systems must ultimately be judged. Coupled with questions over the impact of JIT on logistics performance there are growing concerns about the nature of the SCM approach to logistics which underpin JIT principles. Recently, Martin Christopher and Matthias Holweg have argued that since 2008 ongoing price turbulence across a number of key market indicators has undermined the basic assumptions of the SCM approach. Crucially, they argue that due to this greater volatility, 'supply chain practices may no longer fit the contexts most businesses operate in – primarily because these practices were developed under assumptions of stability that no longer exist.'<sup>579</sup> Although SCM possesses some flexibility, it does not possess the structural flexibility needed to respond to the major changes in the market, which is occurring in the current era.<sup>580</sup>

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<sup>577</sup> However, medical fitness records are only held for 40% of these.

<sup>578</sup> Kane, *Military Logistics and Strategic Performance*, 155.

<sup>579</sup> Christopher, 'Supply Chain 2:0', 63.

<sup>580</sup> Christopher, 'Supply Chain 2:0', 63.

Whatever the relationship between the markets and the strategic situation, it is clear that since the end of the Cold War the world has become less stable. Yet, at precisely the time when complexity and uncertainty are increasing, many Western militaries are downsizing whilst adopting total force concepts and structures in an attempt to maintain capabilities. Clearly, there are advantages to organising integrated forces at tiered levels of readiness, but the re-structuring of these forces is, like the SCM approach the total force concept mirrors, based on clear strategic assumptions of supply and demand. There is little slack left in this more efficient system. Conventional and hybrid threats are increasing and the total force model may not be up to the challenge of meeting them. Indeed, there is already some evidence that Western logistics planners are refocusing on the JIC system the case of another conventional war.<sup>581</sup> In transforming not only their military logistics systems, but also their entire force structure and readiness around post-Fordist principles, Western militaries are now more vulnerable to strategic shocks that could negate the assumptions on which much of the recent logistics transformation is based. Indeed, the British military's embrace of the Defence Support Network indicates an appreciation of the potential vulnerability of SCM identified by Demchak. At the strategic level, it remains to be seen whether a fully networked logistics system, with enough slack and stockpiles to ensure redundancy, can be implemented before the assumptions underpinning SCM are fully tested. However, in the next chapter I turn to examine the impact of the processes of the post-Fordist approach to logistics at the tactical sub-unit level.

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<sup>581</sup> Interview, senior British Army logistics officers responsible for future doctrine, Andover, 9 June 2015.

## Chapter Six

### FR20 at the Logistics Sub-Unit Level: Delivering Capability?

The previous three chapters discussed the historical evolution and the political origins of, and the logistics concepts and processes underpinning, FR20. I showed how this post-Fordist approach is significantly different to how the British Army, and by extension the TA, practiced logistics in the past. As a result of outsourcing logistics to the Army Reserve, its logistics units' missions are now more demanding than in the past. In order to understand capability, culture and cohesion in these units, it is crucially important to understand this changed nature of their organising principles and missions.

The next three chapters examine the impact of FR20 on reserve logistics sub-units. As will be remembered, it is at the sub-unit level that FR20 originally envisaged the most profound changes to Army Reserve capability and deployability. Similarly, one of the greatest areas of risk for FR20 was deemed to be the reserve logistics component, as this required significant organisational changes as a result of the policy. This chapter discusses how the changes outlined in FR20, and the organisational frictions these have created, have impacted a selection of reserve logistics sub-units. In particular, these sub-units' experiences of what I term the 'hard', capability-related impacts of FR20 are examined. These are the interrelated issues of recruitment, equipment and training. Combined, these factors will ultimately determine whether sub-units can deliver the capability required of them under FR20. Throughout this chapter, how organisational transformation has been shaped by the post-Fordist approach to military logistics, and been implemented, is analysed. The conclusion argues that while some sub-units may

prove able to provide the required capability, most are unlikely to do so on schedule, and will be unable to provide an enduring capability for some time to come.

To understand the capability FR20 requires sub-units to deliver, it is important to first outline these sub-units' specific transformation as a result of the policy. The outsourcing of regular army logistics capability to the reserves as directed in Army2020 and FR20 resulted in a number of major structural changes to the reserve component, including the disbandment of some logistics and infantry units, the creation of new logistics units and sub-units, the re-location of others, and crucially, the re-roling of some from one trade to another. As such, for some REME and RLC reservists, FR20 represented not only a complete change in the nature of their military specialist trade (trade training), but also a change of the location in which this was usually conducted. Within the RLC reserves, transport units bore the brunt of these changes. The REME also experienced major structural changes as the old system of Light Armoured Detachments (LAD) – a small team of specialist mechanics attached to other units – was replaced by a new centralised system based around the REME reserve battalion. Simultaneously, the rationalisation of the British defence estate saw the closure of reserve centres and the centralisation and co-location of units in larger bases.

Although there had been consultations and the drip-feeding of information before FR20 was formally unveiled in July 2013, all the selected sub-units had begun to be affected by the policy at the grass-roots level by the summer of 2014. This was when sub-units were informed of the date by which they had to deliver the IOC expected of their newly formed or re-roled sub-units. The IOC date varied from 2016-2017 between sub-units, and it was earlier than the FOC date at which these units are to be fully manned and trained. While the demand on each sub-unit varied in terms of the number of fully trained reservists they were required to deliver and at what stage of the tiered deployment cycle (organised into ten, six-month roules) this must be done, as a general

indicator FR20 required these logistics sub-units to deploy 8-12 members to each roule. However, some sub-units may rotate this requirement with other sub-units in their regiment depending on the requirement after a certain date. Interestingly, none of the selected sub-units were expected to deploy as a fully formed unit, but to contribute a much smaller number of troops. Combined with other sub-units, a reserve RLC regiment would aim to deploy about a platoon's worth of reservists, while the REME requirement was greater, with a Field Company required. Clearly then, in the case of the reserve logistics component, reservists will be deployed in smaller groups than the sub-unit. This was also found to be the case in other infantry regiments and taken together, this evidence supports the previous evidence on how FR20's original goal of deploying formed reserve sub-units has been adjusted as the policy developed.

Apart from their capability requirement, the nature of organisational transformation within the selected sub-units also varied considerably. For example, 165 Port and Maritime Regiment – responsible for the specialist loading and unloading of ship-based supplies in ports and onto beachheads – was expanded to become the largest reserve regiment in the RLC.<sup>582</sup> To fulfil this new capability, new squadrons were added to its order of battle. 232 Squadron (Sqn) – which had been part of 155 Wessex Transport Regiment and was manned by soldiers with advanced heavy vehicle driving qualifications – was directed to re-role to the port and maritime trade. This latter role required a completely different skill set to load, pilot and unload the Mexeflote sea-landing raft. However, it would remain in its Bodmin, Cornwall base. Meanwhile, 142 Vehicle Squadron, which, as part of 166 Supply Regiment was a nationally-recruited driving and maintenance unit based in Grantham, Lincolnshire, kept its trade but was moved to Banbury, Oxfordshire to become part of 165 Port and Maritime Regiment. 142 Squadron also incorporated a large number of former highly skilled Royal Signals

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<sup>582</sup> Interview, senior RLC officer, 25 March 2015.

reservists who had served near Banbury but whose unit had been disbanded as a result of FR20. Further north, 157 Transport Regiment was expanded, with the raising of 398 Transport Squadron in Queensferry, Wales. Simultaneously, the Wrexham-based A Company of 3 Royal Welsh Regiment was told it to was be disbanded, leaving its soldiers the choice of a long commute to stay as infanteers, or a switch to the newly formed 398 Squadron closer to home. Meanwhile, as part of the establishment of the new 105 Battalion REME reserve, one of its four new sub-units, 160 Field Company, was established at existing premises in Bridgend, while another, 130 Field Company, was established in Taunton. Both will centralise previous LADs in these regions, but 130 Fd Coy faces a much tougher task in reaching its established strength as there were fewer LADs in its catchment area, thereby limiting the number of already trained specialists it can draw on. With all LADs incorporated into new battalions, the restructuring of REME reserve units was therefore slightly different to those in the RLC. Complicating matters, individual reservists with long distances to travel to these new sub-units frequently opted to join a differently traded unit nearby.<sup>583</sup> As such, the scope of the transformation within these reserve logistics sub-units was often profound, and represented some of the greatest organisational challenges posed by both FR20 and Army2020. Indeed, the army high command's awareness of the 'high risk' nature of this reserve logistics transformation is precisely why it is so worth of study here.<sup>584</sup> Given the different organisational changes experienced by different logistics sub-units, it is unsurprising that the data revealed varying experiences in the scope, nature and impact of FR20. However, using NVivo software, a number of significant themes emerged.

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<sup>583</sup> Numerous interviewees highlighted the importance of location in determining their choice of unit and complimentary quantitative research has revealed that 55percent of RLC but only 32percent of REME reservists chose their units due location. Bury, P. (2015, unpublished) 'Report on Recruitment and Retention' prepared for CD CSS, 12 January 2015.

<sup>584</sup> Interview 12.

## **FR20 Change Management**

One of the first group interview questions asked respondents about how the organisational transformation of their sub-units had been managed. It is important to note here the initially high levels of uncertainty concerning the future of many logistics sub-units as FR20 planning took place during 2012-13. Many sub-units were aware that they were being considered for reorganisation, but were not certain of the date by which this was to occur, nor its exact extent. Given the scale of the changes happening within the wider army as a result of Army2020, and the knock-on effect this had in terms of determining the required reserve capability, numerous interviews with sub-unit commanders indicated that they were only informed of their final transition plan in December 2013.<sup>585</sup> This uncertainty was reflected in soldiers' experiences of how change was managed in their sub-units. For example, in one RLC squadron, the collective response was:

Moderator (Mod): 'How do you feel the changeover was managed in terms of the creation of this unit?

Respondent (R) 1: I can't fault it. I think it worked really well.

R2: I agree.

R3: Yes.

R4: Once they decided, it was a bit messy, because they split...

R5: We all knew the end goal. I personally thought it was all alright.

R2: The final result was good.'<sup>586</sup>

A REME sub-unit reported a similar experience:

Mod: 'It went smoothly?

R1: Yes.

R2: ... I've found it alright so far, to be honest.

R3: I thought we were definitely kept in the loop. And in fairness to [the OC], he kept us up to date regularly, what was going on, even the things he wasn't sure on, he was coming back to us and telling us, "Right, I'll get back to you on that, let you know what's happening." So yes, I was pretty informed, to be honest. We knew what was coming, didn't we?

R3: ...Yes. What they said was happening has happened.

R1: Yes, it was managed really well.'<sup>587</sup>

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<sup>585</sup> Interview 3; Interview 5.

<sup>586</sup> Interview 1.

<sup>587</sup> Interview 7.

However, representative of the wider sample, even in sub-units that had positive experiences, some individuals who had joined from different parent units felt they had ‘got lost in the wash’ due to a lack of information being provided by their chain of command.<sup>588</sup> Other reservists reported much more negative experiences:

- R1: ‘Very poorly, it was done.
- R2: We all found out on Facebook.
- R3: I was told in an email...
- R4: ... The unit we left, as soon as they said we were going... There was no, “Thank you very much.” It was just like: “You’re going. That’s it. That’s the end of this.” There was no transition period... Since I’ve been here, you’re welcomed in and it’s been an easy transition.
- R1: ... I think it was poorly conducted from the [original unit] side.
- Mod: At what level?
- R1: All.
- R4: At a very high level.
- R3: I thought it was poorly done. I think it came from further up than regiment and battalion. I think it went up higher.’<sup>589</sup>

It is therefore evident that some parent units and newly formed sub-units were better than others at keeping their soldiers abreast of developments.

Prior to the research, discussions with the one-star officer responsible for delivering the logistics capability outlined in both Army2020 and FR20 indicated his belief that leadership would be an important explanatory factor in determining sub-unit experiences of transformation.<sup>590</sup> This was supported by the data. This discussion in one sub-unit is instructive:

- R1: '[Our boss] was a part of the FR2020 team so he was real pro.
- R2: It [successful transition] was down to [the OC's]... Enthusiasm.
- R3: He was very good in that respect.
- R1: I wouldn't say just enthusiasm.
- R4: [His desire for an] MBE.
- R1: No. He wanted to make it work.
- R1: Both for himself and for his blokes, I think.
- R4: ...He did want to make it work. He didn't want it to fail.
- R1: He wanted this squadron to succeed... He wanted the squadron to be the best it possibly can.
- R3: And he has worked. This squadron has worked.
- R4: He's put the effort in.
- R1: A squadron twenty miles down the road with very few new people in it has not worked. It's down to the person...it's the personalities who run the squadron.

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<sup>588</sup> Interview 1.

<sup>589</sup> Interview 5.

<sup>590</sup> Interview, Brigadier Mitch Mitchell, CD CSS, Andover, 29 April 2014.

- R1: ... He doesn't want failure.  
 R5: None of us in here want failure.  
 R3: And I think to answer your question, it was probably mismanaged by people higher, more senior to him and he's managed to keep the flak from us.<sup>591</sup>

The comments above underscore reservists' perceptions of the central role of leadership and personality in not only implementing FR20 at the sub-unit level, but also in protecting lower ranks from organisational friction caused by top-down transformation.

The comments on the MBE are also instructive as they highlight the perceived relationship between mid-level commander's support for organisational transformation and the benefits this will have for their careers. Similarly, soldiers' recognition of potential individual reward as providing a motive for commander performance – and the rejection of this motive by other senior ranks – highlights the potential friction for commanders between delivering top-down transformation effectively and managing the longer-term interests of soldiers. Another interview revealed the possible source of this theme in the sub-unit and how readily junior ranks are willing to support leaders with their best interests at heart:

- R1: 'Our boss here stood out in front of everyone and said, "I'm going to forego my MBE if I get the things that you guys want," and at that point we were like, "Sound." It's a bit of a joke here, though, that he wants his MBE.'<sup>592</sup>

Other sub-units reported similar levels of satisfaction with their commanders' management of change, and officers who 'jumped the gun' or 'got ahead of the game' by enacting transition as soon as it became clear what was required were frequently praised.<sup>593</sup> In terms of the transformation literature, mid-level leadership was therefore crucial to the perceived success of organisational change. Indeed, the role of these commanders may be more important in the reserves' case than in the regular army, due to their part-time nature which means that these units have fewer points of contact with the senior regular leadership that instigated the transformation.

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<sup>591</sup> Interview 2.

<sup>592</sup> Interview 1.

<sup>593</sup> Interviews 1, 5, 7.

While most sub-units recorded relatively positive experiences of leaders managing change, there were a number of negative responses. Most of these were clustered around one sub-unit in particular that had been disbanded. Most of these reservists later joined the RLC or REME. For example:

- R1: The CO never spoke to us and the RSM never spoke to us... [They never said], "This is the decision we've made and this is why we came to this decision that you will be disbanded." So that was very poorly done.
- R2: We still don't know why we've been disbanded now.
- R3: It was bad man management from a commanding officer and RSM.
- R4: I think it went through parliament quite late, didn't it?
- R3: Well, it was still through parliament. The CO could have called us and still explained the decision. I know he had no choice, but he still didn't speak to us, did he? He still blanked us.
- R5: ... Then the [parent unit] were just, like, "Well, if you come you're not getting travel. We're not going to put a minibus on for you," so I personally felt quite let down.
- R6: Yes. I agree.
- R5: After spending ten years with them.
- R7: ... The CO was just, like, "It's closing. Deal with it. If you want to [sub-unit in same unit in different location], you can. If you don't want to, it's up to you." Whereas the REME said, "Come across to us. If you don't want to, just make sure you stay in."<sup>594</sup>

These experiences were repeated by senior ranks from the same unit:

- R1: 'So, you know, these guys have served 20-odd years as a [specialism] and then to be told, in one fell swoop, "You will no longer be [specialism]. However, what you can do is you can go to the RLC."<sup>595</sup>

Supporting the central role of leadership, these negative experiences of transition were largely blamed on individual commanders, with the lack of information and a sense of betrayal evident. However, it is also noteworthy that an understanding of the political nature of FR20 was repeated within this sub-unit as an explanatory factor for poor leadership. There was a palpable sense in the junior ranks' discussion that their original sub-unit had been disbanded due to regimental politics and the wider, politically-imposed nature of FR20. The above quotes therefore indicate a perception that some commanders were relatively powerless in resisting organisational change imposed by the 'higher-ups', be they the military chain of command, or politicians. Similarly, there was recognition and resignation amongst these reservists that higher command's

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<sup>594</sup> Interview 5.

<sup>595</sup> Interview 6.

preferred option was for individuals from their disbanded sub-unit to join an under-recruited, newly-formed logistics sub-unit – rather than continue their specialism in their original unit – in order to make FR20 a success.

In terms of how top-down military change was actually implemented at the tactical level, 232 Transport Squadron were unique amongst the selected sub-units as the chain of command directed which unit and trade they were to become as a result of FR20. Interestingly, soldiers in this unit did not appear disappointed by the fact that they were directed to change, while others in the same regiment were given a choice of new unit. Indeed, individuals in most of the other sub-units were given the choice of joining at least three other units which varied by trade. In the case of the disbanding or re-roling sub-units, such as A Coy, 3 Royal Welsh, or 142 Sqn, 166 Supply Regiment, this meant that these units hosted different events in which diverse units from the Army Air Corps, Intelligence Corps, REME, and RLC all pitched to attract transferees. Most respondents who experienced this were impressed that they were given a choice rather than being simply directed to join a new unit. For example, in 142 Sqn:

(Mod): ‘Were you guys happy with the way that was done, instead of it being directed, you had a degree of choice?’

All: Yes.

R1: It was good.

R2: They put on, like, showcases, which was pretty quality.

R3: It was amazing.

R2: The Army Air Corps brought in helicopters and everything.

R1: Yes. We had a look at life. I felt like a school kid again.

R3: You went round all these different units going, “These are the helicopters. This is a tank.”

R2: You’re never going to drive this!”<sup>596</sup>

Humour aside, reservists originally from 3 Royal Welsh were visited by four units with different specialisms, while a reservist in another sub-unit responded:

‘The RLC gave a better presentation to people to come across. They sold it better. That’s why so many of us came over.’<sup>597</sup>

‘FR20’s been ok for us. Initially when it came in people were worried, but their lives as Craftsmen have changed little, maybe even improved.’<sup>598</sup>

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<sup>596</sup> Interview 1.

<sup>597</sup> Interview 5.

Similarly, some soldiers in 160 Field Coy REME were pleased that on the disbandment of their various LADs they were given a choice between joining the RLC, or remaining in the REME but moving to a centralised location. Of the selected sub-units, there was a trend that a core majority of transferees came from one unit. These were complimented by individuals from an array of other units who usually chose their new unit due to its proximity. Nevertheless, highlighting the varied experiences of individual reservists within these sub-units, and how many sub-units have incorporated individuals with different specialist skills keen to keep their location or trade, a medic reported:

- R1: ‘Yes, it was managed really well. We obviously got told we were transferring across.
- Mod: Offered or told?
- R1: Told.
- Mod: You were told, there was no other option?
- R1: It was a little bit different for us... We just changed the brigade. We are still a unit; we’ve just stayed obviously the same. There was no change.<sup>599</sup>

Overall, while most sub-units were offered a choice of new unit, this was accompanied by a sense of lack of real choice in some cases, and simple top-down direction in others.

Given that FR20 was a top-down imposed transformation, that most disbanding sub-units were offered a choice of future unit is highly interesting. Primarily it indicates the chain of command’s awareness of the importance that location and trade have on reserve service, and in particular soldier retention. Simply designating sub-units to new locations or trades and expecting the majority of their strength to accept this was viewed as risking reservist retention, and this policy only appears to have been followed in one case where the sub-unit remained in location anyway. As such, from the outset, the transformation was undertaken with the goal of keeping as many reservists as possible satisfied, and hence retained, during the re-organisation. That such a quasi-market approach to future service was adopted, and that other units were then so keen to pitch to potential transferees, highlights the increasing realisation amongst commanders that

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<sup>598</sup> Interview 9.

<sup>599</sup> Interview 7.

unit strength – reliant on recruitment and retention – would become a core measure against which they would be judged as FR20 progressed. However, the significance of the availability of choice is deeper than simply the desire for well-manned sub-units. It also points to fundamental difference between how the reserves were re-organised under FR20 compared to the regular army under Army2020. For regular units, far less attention was paid to the impact that re-roling, or a change of location, could potentially have on retention. For example, 1 Royal Irish was directed to leave 16 Air Assault Brigade and take on the new light mechanised role without offering its soldiers the choice to move unit or take on a different specialism. Such a directed re-organisation is common in the regulars, and when compared to that of FR20, highlights the greater emphasis on choice given to part-time volunteers who can leave service at any time compared to their full-time counterparts. Thus, the element of choice in the FR20 re-organisation highlights not only the need to recruit and retain reservists from the outset, but also the variance between how regular and reserve change management was effected due to the different nature of their service.

### **Main Effort: Recruitment**

The expansion of the reserves is a central tenet of FR20, and as discussed in Chapter Four, due to arguments between the army's senior leadership and politicians about how quickly this could happen – and subsequent recruiting problems – reserve recruitment has become both a politicised and controversial issue. It is also become the benchmark by which the media judge FR20's progress. It is therefore highly worthy of examination at the sub-unit level. During the numerous visits to army headquarters, regimental headquarters and squadron lines to arrange and conduct individual and group interviews, it was possible to read the concept of operations slides that are customary for commanding officers to display in their units along with Part 1 Orders. These slides provide an interesting insight into their respective units as they succinctly contain the

commander's mission statement for the unit and the scheme of manoeuvre for how this mission will be achieved. Central to the basic concept of operations is the identification of the main effort, which sets the unit priority for the next year, or for the commander's time in charge (usually two years). What was highly interesting viewing a number of these slides across commands and trades during 2014-16 was that, without fail, the main effort in each unit was recruiting. Crucially, this indicated that most of the activity the respective sub-units were conducting was therefore related to recruiting. Furthermore, on these visits, usually within two minutes of meeting the officer commanding – and indeed other ranks – they would mention their squadron's strength and recruitment. Indeed, as a former regular, I was often quickly asked if I wanted to join the sub-unit. This evidence gives some context as to how pervasive the 'numbers game' mentioned in the last chapter had become at the sub-unit-level.<sup>600</sup>

FR20's central emphasis on recruitment and its major impact on squadron activity after transition were evident in the group interviews. Indeed, the perception of recruitment's primary, indeed defining, importance to FR20 was repeated frequently:

R1: 'I don't believe there's any change...  
R2: The biggest thing's been a big push on recruitment.'<sup>601</sup>

R1: 'At this stage of the game, I don't think there's a lot of difference between this and the re-org in '96. The only difference is the actual emphasis on recruiting.'<sup>602</sup>

Another senior rank in the same unit concurred:

R2: 'we are carrying on as we did when we got re-org'ed the last time. There's not enough emphasis on trade and actually bringing us up to fulfil that role. But there is emphasis on actual recruiting to get numbers up. So if we can get numbers in the door, then I don't know where they're going to take it from there. But the emphasis is on to get numbers through the door.'<sup>603</sup>

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<sup>600</sup> Interviews 1, 2, 5, 6, 7, 8, 9.

<sup>601</sup> Interview 10.

<sup>602</sup> Interview 2.

<sup>603</sup> Interview 2.

This focus on recruiting raised a number of related issues. Perhaps most importantly, as the quote above indicates, all ranks across numerous sub-units supported the assertion that with recruitment as the main effort, the balance between it and individual and collective training had been upset:

- R1: ‘Mainly we’re doing recruiting and nothing else.
- R2: Recruiting’s everyone’s business.’<sup>604</sup>
- R1: ‘We haven’t really done any of that, [training with regulars] really, have we? We’ve had one or two little weekends.
- R2: No. It’s just more the regiments getting used to the new system.
- R3: I think it’s because our main aim is recruiting still.’<sup>605</sup>
- R1: ‘My whole time is me helping them through their recruit process. I haven’t got time then to be going to do my training. So yes, although we get extra days, a lot of my days are going towards recruiting, not man training days.’<sup>606</sup>
- R1: ‘I think the balance is slanting [toward recruitment]. I think without a doubt it’s been recruitment, recruitment, recruitment… yes, recruitment is number one priority for most reserve units; however, it’s closely followed by retention and trade training.’<sup>607</sup>
- R1: ‘To get us to our 30,000 before 2020, which is where, I think, the emphasis is, as opposed to making us a better unit to actually support the people that we are supposed to support.
- R2: Yeah
- R3: It’s changed slightly this year, hasn’t it?
- R2: It has, yeah.
- R3: I mean, 2015, all of a sudden, they’ve realised, if they don’t put some trade on then nobody is going to go anywhere [i.e their careers will not progress].’<sup>608</sup>

As the last quote highlights, soldiers in some sub-units did perceive the lack of training had begun to be addressed, but it is clear that FR20’s drive for numbers, initially at least, created friction between recruitment and training to deliver capability. Clearly, senior command knew that it would take time to expand the reserves, and that collective training to confirm capability would necessarily follow this expansion. However, the problems recruitment has posed in terms of time and effort highlight an organisational paradox inherent in FR20 between expanding sub-units and delivering quality training

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<sup>604</sup> Interview 1.

<sup>605</sup> Interview 8.

<sup>606</sup> Interview 5.

<sup>607</sup> Interview 4.

<sup>608</sup> Interview 2.

that ultimately retains existing soldiers. The prevalence of this issue was confirmed in a follow-up interview in 2016. The quotes from the below interview are particularly indicative as they are taken from one of the most positive sub-units in 2015, which was now fully manned a year later. Here, the emphasis on recruitment was still viewed as negatively impacting trade training and ultimately, retention:

- R1: 'It's been nice to have a group and start having more people coming through. So that has been a big positive. At one point it was pretty much all full screws and nobody else...'
- R2: [but] there's no retention
- R3: And training aids for the boys, for the workshop floor. Welding training aids. Everything. [First aid] training aids. There's nothing here really is there?
- R4: Weapons is a nightmare...
- R3: There's just no way of teaching anything
- R4: This is across the board.
- R5: ... we've got no training aids to teach the new crafties coming through.
- R1: ...Just the bare bones of what the unit should have and nothing more.'<sup>609</sup>

Thus, the lack of trade training and its impact on retention was still widely perceived as being caused by a lack of basic equipment in reserve centres. As another soldier stated: 'Our recruiting target is over the 100 percent mark, but keeping them interested is another thing.'<sup>610</sup>

The emphasis on recruitment in the reserves has created other organisational problems. Numerous reservists cited the saturation of recruitment teams from different reserve units competing for the same recruits in their region as an example of an uncoordinated wider approach to recruitment. The drive to recruit in ethnically-diverse areas was also seen as unsuccessful in those sub-units which had attempted to do so.<sup>611</sup> The quote below emphasises the lack of planning and resourcing of recruitment activity at the sub-unit level:

'We've still got Army Reserve recruitment teams who are not trained, not equipped, setting up army recruitment stands with white vans. Who are we recruiting for? What are we doing? Are we recruiting for Ford or Vauxhall, because that's what we're selling? We're not marketing it correctly. We're not

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<sup>609</sup> Interview 8.

<sup>610</sup> Ibid.

<sup>611</sup> Interviews 1, 2, 3, 6.

providing the training for the recruiting teams and we're not being selective enough in those who are recruiting for us. We're not looking to attract the main target audience. Standing in a high street on a Wednesday afternoon with a white van and a gazebo is not going to recruit people for the Army Reserve.<sup>612</sup>

This lack of recruitment resources in recently raised logistics sub-units is particularly interesting because, given the high risk nature of their transformation, their centrality to FR20, and the difficulty reserve logistics units usually have recruiting compared to the combat arms, it might have been expected that they would have received extra support. This has clearly not been the case. Crucially, the lack of resourcing of recruitment activity was widely perceived as resulting from the outsourcing and centralisation of recruitment to Capita. As one senior NCO in another sub-unit explained: 'I wanted to get £50 to put up our details on the boards at the [local rugby team]. The loops we had to go through with Capita... it simply wasn't worth it.'<sup>613</sup> Similarly, reservists in other sub-units were aware of the initial problems and delays the Capita contract had caused in reserve recruiting,<sup>614</sup> indicating a collective wariness about its centralisation in general. Indeed, again highlighting the ad hoc nature of FR20's development, when the Capita contract was originally negotiated it did not envisage the reserve piece, which relies on local activity to a much greater extent than the regular army.<sup>615</sup>

Similarly, the perception within most sub-units was that the emphasis on the quantity of recruits had come at the expense of their quality. An RLC senior rank summarised the general attitude best: 'Yes. This unit's conversion rate is good. It's about quantity. Really it should be quality.'<sup>616</sup> Within this theme, a number of issues were identified, the first of which concerned new recruits. Some reservists believed that new recruits were less suitable for military life than in the past due to increasingly

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<sup>612</sup> Interviews 6, 14.

<sup>613</sup> Interview 14.

<sup>614</sup> Interviews 10, 1.

<sup>615</sup> Interview, Major General Dickie Davis, 27 February 2015.

<sup>616</sup> Interview 10.

sedentary lifestyles,<sup>617</sup> others that recruits were too young.<sup>618</sup> Another squadron noticed that recruits were younger, more likely to be female, and that they had provided some ‘brilliant’, committed new members.<sup>619</sup> Others were more outright in their criticism, specifically focusing on how physical standards had been dropped in order to increase recruitment:

- R3: ‘I work in recruitment, on a Tuesday night, there are people down there now [in the recruitment process] that shouldn’t be. There’s absolutely no way.’
- R2: They’re just keeping them there for a numbers game
- R1: The big one that I’ve noticed is because it’s such a numbers game, the amount of fucking dross that we’re getting through the door, that they suddenly say, “Right, that’s recruitment, you’ve got to bend over backwards for them,” you just think, “Why am I wasting my fucking time?”... Some of them can’t even do press ups or sit ups. They can’t even lift their own bodyweight.
- R3: ... You’re probably talking less than 50percent that we reckon will actually be able to go through it [the recruitment process].
- R1: ... These guys should be able to turn around and say, “Look, come back in three months’ time when you’re fit.”
- Mod: The way it used to be [before FR20]?
- R2: Yes.
- R1: Back then... you had the authority to do that, whereas now... I’ve spoken to all high ranks saying, “Look, it’s not going to happen.” “Put it in a letter.” So I put it in a letter and nothing happened.”<sup>620</sup>

However, perhaps reflective of the more specialised skills required of their trade – and the higher aptitude scores required during soldier selection – the attitude was noticeably different in REME squadrons.

- R1: ‘I don’t think the quality of the recruit is any different to how it’s always been, to be honest... The only difference is the [unit] they are in and the type of training that they are doing... But the guys coming through the door, as long as they are eager and they fit certain criteria [mechanical aptitude], then it doesn’t matter...’<sup>621</sup>
- R1: ‘Well, we do go for quality. We know we cannot just take anybody on... You’ve got to take people on with some form of mechanical electrical knowledge. Even if he fixes or restores his own cars at home. He’s got a foundation there of some sort. We’ve tried it before with people who were non-mechanic...’
- R2: And it shows.<sup>622</sup>

Overall, therefore, RLC reserve squadrons appeared to be more concerned about the

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<sup>617</sup> Interview 1.

<sup>618</sup> Interview 2.

<sup>619</sup> Interview 10.

<sup>620</sup> Interview 1.

<sup>621</sup> Interview 7.

<sup>622</sup> Interview 8.

quality of recruit they were attracting, while REME companies appeared to be insulated from this because mechanical aptitude was a recognised requirement for successful service. Although there was recognition that ‘some good ones have come through’<sup>623</sup> soldiers across the REME and RLC stated that some of these had been lost due to problems with the outsourcing of the reserve recruitment process, which some still perceived as too slow despite recent attempts to expedite it. Another reason for the failure to retain suitable recruits was the successive nature of modular training which can force a recruit who misses an important weekend to wait up to six months for another, thereby delaying their individual advancement.<sup>624</sup>

The commitment and the ability of new recruits – and indeed existing reservists – to meet the minimum required professional standard for reserve service was related to this quantity versus quality debate. This minimum standard was perceived to be the completion of the required Military Annual Training Tests (MATTs) as directed by the army. The inability of some reservists to compete these was a particular source of ire, further indicating the dichotomy between FR20’s emphasis on quantity and delivering reservists of the expected professional standard:

- R1: ‘The Reserves, as a whole, are treated with kid gloves. “We don’t want to upset them because they might leave.” I say bollocks to that... if they’re fucking old and they can’t do the fucking job get rid of them.
- R2: Exactly. That is a massive smack in the face... if you can’t pass your MATTs and you’re not physically fit then why the fuck should you get your £2000 [bounty] a year like everyone else does that puts the effort in?
- R3: It all goes back to numbers.
- R4: If you did that, you’d get a few leaving. You need people on the books. It doesn’t matter if they’re fat.’<sup>625</sup>

The quote above highlights how the numbers game has caused the retention of reservists who are failing to meet the required standards. This issue of the physical fitness of recruits and reservists, and in particular logisticians whose primary role is not combat, is

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<sup>623</sup> Interview 2.

<sup>624</sup> Interview 2, 8.

<sup>625</sup> Interview 1.

likely to continue as the twice annual Personal Fitness Test has been extended to all reservists as a result of FR20 (including previously low readiness logistics sub-units), creating further potential friction between the professional standards of the regulars and retention in the reserves.<sup>626</sup> Related to the collective desire for committed, professional members, another commonly expressed opinion concerned the quality of ex-regular transferees attracted by the £10,000 bonus – paid over three years – for joining the reserves. This incentive, introduced in 2014 after it was clear former regulars were not transferring in the expected numbers, has been successful in increasing ex-regular recruitment. However, it is not without controversy

‘The ex-regulars are coming in because they are thinking: “Wicked, we are getting £10,000 over a period of [three] years”... And then they are not turning up for training. They’ve come in to do their bare minimum... we really want the regulars because we need to glean from them and learn from them. But they see it as now it’s an easy bus ticket... and then what are we getting out of it?’<sup>627</sup>

This reservist again highlights the expectations of professionalism and commitment she expects of those in the reserve. Furthermore, the belief that some ex-regulars were not committed to the reserves due to the monetary incentives on offer was repeated in a number of other interviews.<sup>628</sup> While discussed in detail in Chapter Eight, it is worth noting here that the fact that some reservists felt aggrieved at the commitment of some regulars is itself indicative of the growing professionalism of the reserves.

Striking the right balance between recruiting committed reservists, and offering the right pecuniary benefits to attract and retain them, has become an increasingly important issue given the controversy over recruitment quantity and quality. Since 2013 the government has spent tens of millions of pounds on recruitment campaigns that have struggled to gain traction. It has therefore introduced substantial joining bonuses to both ex-regulars and new recruits, who are offered £300 on attestation and a further £2000

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<sup>626</sup> Interview 14.

<sup>627</sup> Interview 7, 17.

<sup>628</sup> Interview 2.

after completing their first years' training commitment. Following previous research,<sup>629</sup> and at the request of the army, a quantitative examination of reserve RLC and REME soldiers' reasons for joining was undertaken to compliment this study. The data revealed that a greater percentage (76 percent) of the statistically-significant sample joined for institutional, intrinsic reasons – such as to be challenged or to serve their country – compared to occupational, extrinsic reasons, such as for pecuniary benefits and occupational development (63 percent).<sup>630</sup> Crucially, institutionally-motivated soldiers were found to have longer career intentions and were more committed to reserve service.<sup>631</sup> This data was supported by the interviews:

- R1: 'Pretty much people just walked through the gate beforehand, didn't they?'  
R2: Yes. They had to find us.  
R1: I think that was the difference. They wanted to come and find you. Now we're going into town going, "You can walk and you can breathe. You'll do... Sign this bit of paper, son."<sup>632</sup>  
R1: 'It's all well and good recruiting someone, but if they're: "Mmm... I don't know if I want to do it." You want someone who really wants to do it - like I really wanted to do it - then they'll do it. If they're half-hearted people, they will fall out, they won't want to do it. And there's not many people that I think that really want to do it. You have to think... I always look for the next challenge. That's what I do. That's how I am.'<sup>633</sup>  
R1: 'The whole point of this [FR] 2020 is surely about saving money. Let's take a couple of steps backwards. How much is it really costing with all these financial incentives that are coming in? Are they really, on the long-run, going to save money?'  
R2: After three years, are they [new recruits and ex-regulars] going to stay in?  
R1: Exactly my point being is, these "retention [bonuses]" ... are not really. They're sweeteners, not retention, because, once that money runs out, are people going to [leave]... whereas you've got the mainstay of the

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<sup>629</sup> Moskos, C. (1977) 'From Institution to Occupation, Trends in Military Service' *Armed Forces and Society* 4(1), 41-50; Griffith, J. (2007) 'Institutional Motives for Serving in the U.S. Army National Guard: Implications for Recruitment, Retention, and Readiness', *Armed Forces and Society* 34 (2); Moskos, C. and Wood, F. (eds) (1988) 'Introduction' in *The Military: More than Just a Job?* New York: Pergamon-Brassey.

<sup>630</sup> Bury, P. (2016) 'Recruitment and Retention in British Army Logistics Units', *Armed Forces and Society*, available at <http://afs.sagepub.com/content/early/2016/07/21/0095327X16657320.abstract>, retrieved 7 September 2016, 12.

<sup>631</sup> Ibid, 19.

<sup>632</sup> Interview 1.

<sup>633</sup> Interview 10.

reserve... 20-odd years, 30-odd years down the line and we haven't had any incentives to make us stay. Do you see what I'm saying?'<sup>634</sup>

These reservists clearly believed institutionally- and intrinsically-motivated recruits are required in the long term. When the arduous courses elite regular units such as the Parachute Regiment and Royal Marines use to select the best soldiers are considered – which only offer minor monetary benefits if completed – this belief appears particularly credible. However, the institutional-occupational distinction is not mutually exclusive. One reservist remarked how she 'joined for the experience but now it's about the money',<sup>635</sup> while another senior rank adroitly argued:

'When... you actually tell them what they can get out of it: licenses, this, that and the other, it's a massive eye-opener. But it's the way we sell it... they don't go deep enough in actually saying: "Look. You get paid for this. You get this, you get that." And people say, "Oh, money shouldn't come into it." Of course it does. This is Cornwall. It does count as an income to a lot of the guys. Nature of the beast... The majority of people in Cornwall are on low income, minimum wage. Well, if you can top that up being in the Army Reserve then all well and good. And that's what happens.'<sup>636</sup>

Pecuniary and development benefits clearly play a major role in recruiting and retaining reservists. The question is therefore about where the right balance lies between institutional and occupational recruitment models. The fact that some regulars' motivations were perceived as circumspect due to the bonuses on offer, and that compared to the past, recent recruitment campaigns have highlighted the (increased) material benefits of service, raises interesting questions about the long term commitment of reservists recruited by campaigns that stress occupational benefits. Indeed, there is an awareness amongst senior officers of the potential risks of the occupational recruitment model.

Another major sub-theme was the degree to which soldiers perceived the recruitment drive as resulting from politics. This was related to a lack of confidence in the Army Reserve's ability to recruit to its FR20 target strength.

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<sup>634</sup> Interview 8.

<sup>635</sup> Field notes, 8 May 2015.

<sup>636</sup> Interview 11.

- R4: 'I don't think they're doing enough to make it a success. I think that people have actually used this for political gain and... they're not really supporting. They're not investing.'
- R1: ...The politicians have got it wrong... To attract young people into [the Army Reserve], it's a real challenge. They [young people] don't understand it. They don't know what it is.
- R2: They [politicians] put a lot of weight on all the regulars that they kicked out on joining the TA and it hasn't happened.
- R3: No military boss is going to cut their army. It's got to be an opinion of the politician, hasn't it?'<sup>637</sup>
- R1 'What they wanted, I think, was all the regulars made redundant and join the TA, but that hasn't happened. That's what they wanted. Then they ha[d] to say, "We're going to get 30,000 regulars," but that's not going to happen.'
- R2: Politicians are causing all this. They call all the shots and we just have to say... "Yes, sir." "No, sir." That's what it comes down to.'<sup>638</sup>

The quote above is also noteworthy for an awareness of the failure of regulars who had been made redundant to join the reserves in the expected numbers due to the initial lack of incentives on offer, further supporting previous arguments about the ad hoc evolution of FR20. Meanwhile, the political theme was repeated frequently across ranks and sub-units:

'Everyone in the army knows this plan is politically driven.'<sup>639</sup>

'The 30,000 in seven years is pie in the sky.'<sup>640</sup>

'Yeah, we recruit to our targets... But will we reach it [full sub-unit strength] by [2019]? No.'<sup>641</sup>

Senior ranks were also aware that total sub-unit membership did not reflect real, trained strengths:

- R1: 'It's not accurate, either.'
- Mod: What isn't? The recruiting?
- R1: The numbers. We've got 72 people on the books, because we've got 72 members, but of that I would say there's only 40 percent that turn up, and they'll get their certificate of competence at the end of each year. So, in actual fact, from a squadron of 70, there's only 40 people.'
- R2: That is your true strength.'<sup>642</sup>

Although significant given FR20's emphasis on numbers, this finding is not as controversial as perhaps it first appears. In the 1980s Walker recorded that TA turnout

<sup>637</sup> Interview 6.

<sup>638</sup> Interview 5.

<sup>639</sup> Interview 19.

<sup>640</sup> Interview 2.

<sup>641</sup> Interview 11.

<sup>642</sup> Interview 6.

varied between 40-70 percent of total strength and that most units had a ‘hard core’ of about 40 percent.<sup>643</sup> The interviews revealed that this situation suited some sub-units as it gave them a greater allocation of Man Training Days (MTDs; the metric by which funds are allocated to units and which ultimately determine training) to be utilised by core members.<sup>644</sup> Another sub-unit noted problems in retaining these new recruits.

- R1: ‘You have loads of people coming in, and may get into the unit, and then very few stay. They just...  
R2: Well, we have as many go as we do come in the door.  
R3: Yeah, that's right.  
R1: ... We could have a battalion here. The amount of people I've seen in seven years come through these doors, and started, actually got into the regiment and uniform, and signed up, and even some of them have gone up to the basic training and finished all that. And they're just... gone.’<sup>645</sup>

While the same problems were not replicated across the sample, overall there was a general trend that RLC squadrons were less optimistic about their ability to recruit to full strength by 2019, despite the effort these sub-units had expended to date. REME squadrons were generally more positive about their ability to get to full strength. While overall experiences were mixed, it is clear that major issues remain concerning recruit quality, commitment and retention in some of these sub-units.

However, the most controversial finding concerned the reporting of sub-units’ strengths. With a 40 percent core of regular attendance, in most reserve units another 30 percent attend once a month and the remainder rarely. Usually, once a reservist has not attended for six months, they will be struck off the sub-unit books and the discharge process instigated. However, this study revealed numerous cases where sub-units had been instructed by higher command to keep personnel who had not attended for over one – and even two years – in order to show their strengths were rising and hence support the narrative that the Army Reserve is growing as a result of the recruitment drive. One example from the fieldwork is particularly instructive. Arriving at a sub-unit,

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<sup>643</sup> Walker, *Reserve Forces and the British Territorial Army*, 107-8.

<sup>644</sup> Interview, 11.

<sup>645</sup> Interview 10.

I was shown its personnel roster displayed on the wall by a concerned senior soldier. Of the approximately 50 reservists on it, one third were highlighted in yellow as not having attended a parade for a year. The soldier explained: ‘Some of these haven’t attended in two years or more. We’ve been told not to shit-can anyone ‘cause it looks bad on stats... we’ve got to keep these on our books to make our stats look good... If I went to the papers with this they’d have a field day.’<sup>646</sup> The soldier explained that he understood the direction to effectively ‘cook the books’ had come down from higher command in the past year, but that it would be reversed soon. It was not the aim of this research to uncover who issued this direction, nor when, but the general finding was supported by numerous other sources. As these soldiers explained in separate interviews:

‘The other thing, I think, especially the senior ranks, because they know more and they’ve been around more, is the deceit that is put on the news channels that “we’ve recruited this many” and we know all these numbers aren’t true. It’s creative accounting at its very best, because we are here in a squadron of 110, 120, and there’s how many people tonight? 12? 10 percent.’<sup>647</sup>

R2: ‘The problem is it’s that bit of paper there and it’s “how many numbers are on that bit of paper in that book?”

R1: It’s just so wrong.

R2: That’s what it boils down to. Somebody will open that and go, “Oh, your books are looking good.”<sup>648</sup>

R6: ‘From what I see of it, there are a lot of paper soldiers on the books in the Reserves.

R2: Yes.

R6: Half the people who are actually on the books, which the government figures are on target, they don’t exist.

R1: But ... there’s not a commanding officer who’s in charge of a Reservist unit who’s going to go, “Ah, not turned up. Strike off the books,” or, “Not suitable. Strike off the books.”<sup>649</sup>

Similarly, questioned on recruitment, an officer in a different sub-unit offered the following analysis:

‘It’s quantity over quality. And to be honest it’s forcing us to play politics. We say our strength is higher than it really is and the Chain of Command pass that up. Of course they know it too... it’s forcing us to be political really.’<sup>650</sup>

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<sup>646</sup> Interview 20.

<sup>647</sup> Interview 11.

<sup>648</sup> Interview 2.

<sup>649</sup> Interview 7.

<sup>650</sup> Interview 21.

A recent newspaper report corroborated this data with evidence from other units, with ‘senior military sources’ also stating that reservists who fail their fitness or weapons handling MATTs were not being discharged, supporting the evidence presented above.<sup>651</sup>

These are significant findings for a number of reasons. Most obviously, they indicate that some units have been directed to report inflated strengths in the full knowledge that in reality up to a third of this strength are not active members. It also indicates that the chain of command, in areas where it has not directed this to happen, is still complicit in it. However, perhaps most worryingly, it indicates the degree to which sub-units and, perhaps the chain of command, have been forced to support what is an inherently political plan. In doing so, it raises major questions about transparency in Army Reserve strength figures. Perhaps more worryingly, as the officer above hinted at, this practice is blurring the traditional – and legal – line between politics and service in the armed forces, thereby making some senior soldiers and officers uncomfortable with the manner in which they are supporting FR20.

### **Equipment, Training and the Limits of Post-Fordism**

FR20 pledged to invest £1.2 billion in Army Reserve equipment and training over ten years and in order understand whether sub-units were becoming more capable, reservists were asked whether they perceived increased levels of equipment and training in their sub-units as a result of the reforms. Strachan and King have both shown how training is crucial to understanding cohesion and effective performance in the infantry.<sup>652</sup> While basic specialist infantry drills are relatively easy to conduct with soldiers and personal weapons – and RLC and REME reservists do learn basic infantry skills – the availability of equipment, and especially vehicles, on which to train is

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<sup>651</sup> *The Daily Express*, (3 January 2016) ‘British military reservists hugely undermanned, say army whistleblowers’.

<sup>652</sup> King, *The Combat Soldier*; Strachan, ‘Training, Morale and Modern War’.

particularly important in these sub-units as without them realistic trade training is difficult to conduct. Thus, the availability of vehicles to regularly train with is central to retaining the specialist skills and knowledge required for these sub-units to collectively deliver the capability outlined in FR20.

One frequently occurring theme was the lack of vehicles and equipment available to at sub-unit locations:

R1: ‘From a training perspective, here on a Tuesday night we don't have a chance to do anything for vehicles. Skills training, yes you can do that here. You could probably do with more kit like pistols.’<sup>653</sup>

R1: ‘We get the basic uniforms, but we haven't got the main kit like trucks and weapons and radios. We still haven't got that.

R2: We're still a bit Dad's Army

R3: We've got nothing. When we first started, we were doing infantry lessons, skills, but with no weapons. The equipment is there. We just can't get hold of it full-time.

R2: ...We've already lost a year's training [because we] still [had] no trucks.<sup>654</sup>

R1: ‘We've only been affiliated since November [2013]... Before that we weren't on the actual map. So now we... can start getting this kit. So it will come eventually.

R2: I manage the equipment here. At the moment, we hold barely any equipment within the squadron. Is that a regimental fault? I don't know. So, as to equipment, no, we beg, steal and borrow from the other squadrons. We've got minimal equipment just to keep the squadron afloat...<sup>655</sup>

While there was an acknowledgement that equipment would become available as transition progressed – and there was clear evidence of this during the research project<sup>656</sup> – it was clear that this had had an impact on numerous sub-units to date.<sup>657</sup> However, soldiers in a REME field company did note the better availability of equipment since FR20 and the positive impact this had had on training, indicating that experiences varied in this regard:

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<sup>653</sup> Interview 1.

<sup>654</sup> Interview 5.

<sup>655</sup> Interview 6.

<sup>656</sup> Field notes, 21 Feb 2016.

<sup>657</sup> Interview 14.

'I've been in seven or eight years and it [was] always Bedfords or Land Rovers you'd be working on... The operational kit has started rolling through now, which never used to happen.'<sup>658</sup>

Meanwhile, following the rationalisation of the defence estate, the lack of infrastructure in reserve centres was another theme that indicated problems with the synchronisation of transition. This appeared in numerous interviews:

'...the infrastructure wasn't in place. We're now a year down the line... they've announced that there's going to be something like a couple of million pounds worth of new equipment that the reserves will have. We've got, on our account at the moment, 40 weapons only. We're still waiting for the equipment to come... Things like that [haven't] been handled well. I think any unit going into a location, the infrastructure should be in place. The equipment table should be in place. Then, the troops come in. To get the troops in first, and not have the infrastructure in place, is not great.'<sup>659</sup>

The fundamental thing that was wrong when we first started was that by the time we started we had no infrastructure whatsoever.<sup>660</sup>

Other soldiers succinctly commented:

'The Army's come up with this master plan. The stuff should have been there before we came over.'<sup>661</sup>

'The fundamental thing that was wrong when we first started was that by the time we started we had no infrastructure whatsoever.'<sup>662</sup>

Other units reported an initial lack of showering facilities that hindered physical training, while a lack of offices was also a problem.<sup>663</sup> The fact that a number of centres did not have Defence Intranet terminals was also problematic as it made conducting personal administration tasks more difficult.<sup>664</sup> However, other units saw the beneficial aspects of estate rationalisation, and the centralisation of units this had caused:

R1: '[It] was very hard for command and control, unit cohesion, and everything like that. It was very difficult. Now, it's been under one unit...

Mod: It's centralised?

R1: Yes. It is so much better. You're recruiting for one location. You've got a commander control in one location. Everything is centred around here. So, that's been a big bonus.<sup>665</sup>

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<sup>658</sup> Interview 8.

<sup>659</sup> Interview 3.

<sup>660</sup> Interview 6, repeated in 2, 5, 14.

<sup>661</sup> Interview 5.

<sup>662</sup> Interview 8.

<sup>663</sup> Interviews, 5, 6, 13, 14.

<sup>664</sup> Interviews 5, 6, 14.

<sup>665</sup> Interview 3.

There was also a large degree of acceptance, and patience, that these infrastructure issues were an initial result of the reorganisation and that they would eventually be resolved.<sup>666</sup>

However, it was interesting to note reservists' perceptions that many problems with equipment availability were the result of centralising kit whilst outsourcing its management to civilian firms. This was apparent across RLC and REME sub-units and occurred without respondents being asked directly about the effects of centralisation or post-Fordism in general. For example:

- R1: 'Apparently the British Army doesn't own any low loaders [heavy transporters] now. It sold them all.'
- R2: 'Yeah. [Outsourced] Contract.'
- R3: 'Mr. Witham [civilian military equipment sales firm] will now sell them back to us at twice the cost and get another MBE for it.'
- R4: 'It won't be Withams. It'll be [other firm] who do the delivery. They've got the contract.'<sup>667</sup>
- R1: 'The one thing that seems to be a little bit confusing is they're downsizing the regulars, expanding the reserves, but they're downsizing the size of the [vehicle] fleet.... If people are going to go down the [centralised] whole fleet management side, forget it. They've tried that before. It's a bag of shit... I've been here 30 plus years and I've seen all fleet management tried many a time before.'
- R2: 'Plus whole fleet management works for regs because – this is the regs and the reserves thing again – because [if] you're deploying out this weekend, you need five vehicles. That's five drivers, plus a driver to drive those drivers to get those vehicles. Do you know what I mean?'<sup>668</sup>

The frictions created for reservists by centralised equipment stores and outsourcing was repeated in other sub-units:

- R1: 'The thing is though, for us to do a trade training weekend, we've got to go all the way... up to Marchwood... They've got a hell of a hike to get up there.'
- R2: 'You spend most of the time travelling, don't you?'
- R1: 'That's a lot of time travelling.'
- R3: 'I've also heard that Marchwood was being sold.'
- R1: 'They have. They've sold it.'
- R2: 'They've sold it, and so the military are only going to get limited hours using it.'
- R3: 'And we don't know how that's going to affect the equipment and kit that's up there, whether that's all going to go, whether we're not going to get it, or whether it's going to come to Plymouth.'<sup>669</sup>

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<sup>666</sup> Interviews 5, 6, 7, 13.

<sup>667</sup> Interview 1.

<sup>668</sup> Interview 8.

<sup>669</sup> Interview 11.

The reference to the sale of Marchwood Sea Mounting Centre to civilian port management firm Solent Gateway in October 2015 is particularly interesting in terms of the post-Fordist approach. The port is under-used in peacetime and as a result the government expects to generate revenues by allowing Solent Gateway to use it for 215 days per year. The remaining 150 days' use is shared between the regular and reserve port and maritime RLC units who train and unload vessels there. While the contract was in part negotiated by the regular RLC officer responsible for the port at present, the 150 day limit has raised concerns over availability of the port for reservists, given they do not usually train during the week when the regular units would be using their allocation of days. As such, the outsourcing of the port was designed more with the regular, rather than the reserve employment model, in mind.

The interviews also revealed problems with the plan to outsource maintenance tasks from the regulars to the newly centralised reserve REME battalions as part of the integrated whole force concept:

- R1     ‘...they’re trying to run it [equipment maintenance] like a regular battalion... We just haven’t got the manpower. It cannot be done.
- R2:    Production’s limited during the week because we’re only there for a couple of hours Wednesday nights. So you can’t undertake big tasks if they need the kit.
- R2     I think they sold it to us originally that this is obviously all aimed at keeping competencies up for the tradesmen... But me personally, I think that we’re doing less now than we were when we were [as LADs] with the other regiments.
- All:    I’d agree with that.<sup>670</sup>

Clearly, centralisation, outsourcing and the attempt to better integrate the reserves following the network approach indicate that the adoption of post-Fordist principles is having major impacts on these sub-units' ability to train and, within the REME at least, also on the regular's expectations of them to share the maintenance burden.

In sub-units that reported a lack of equipment and/or infrastructure, this was seen as a major obstacle to delivering routine collective trade training:

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<sup>670</sup> Interview 8.

- Mod: 'How do you think the move, then, and the transition has affected training?
- R1: Dramatically.
- R2: Yes, because the vehicles... the biggest seller for an RLC transport unit is vehicles... They want to do training in the Man SV [truck]... However, what they [reservists] require is the vehicles for them to drive. If they haven't got their vehicle to drive, then they're going to start to walk [i.e leave the unit].
- R3: ...We're not just planning for training at the minute. We're planning to collect kit so we can train.'<sup>671</sup>

This last quote underscores the problems caused by centralised equipment stores for reserve sub-units.

- R1: ...Due to the lack of kit, Tuesday drill nights are becoming repetitive. We are running out of subjects that we can actually cover. There's only so many times, without practical training, that you can deliver theoretical training on a drill night...
- R4: For me, the infrastructure problems will have an effect on recruiting, because a young man, young woman, will come into here, predominantly they are employed in all different types of sectors, some with different educational standards. They walk in and they have a little look at this building. 'Do I want to be part of this organisation?' Yes, we can mask things up. When they chat to other people... we're meant to be attracting people, not taking people back to a throwback from the 80s. They will not go into a working environment that is below standard.<sup>672</sup>

While these senior NCOs' comments, and those in other sub-units,<sup>673</sup> underscore the relationship between equipment, infrastructure and training, soldiers in the same unit also highlighted the importance of being able to collectively and routinely train in their specialist trade in order to prevent the loss of skills learnt on individual qualification courses.

- R1: 'It's alright smashing out the courses, but unless you all get together, and not just over a weekend, [collective sub-unit competency will not improve].
- R3: You can't really develop if, again, you haven't got the kit. So it's all going to come back to kit, by the way.'<sup>674</sup>

As such, the lack of equipment was seen as a crucial impediment to conducting collective training, and it combined with the emphasis on recruitment activity to further threaten retention. As discussed below, while the success of FR20 in RLC and REME sub-units will ultimately rest on their ability to provide enough individuals trained to the

<sup>671</sup> Interview 6.

<sup>672</sup> Interview 6.

<sup>673</sup> Interviews 2, 14.

<sup>674</sup> Interview 5.

required level of trade specialisation, individuals across ranks and sub-units expressed that the lack of routine collective trade training was causing skill-fade and low confidence.<sup>675</sup> Due to FR20's tiered readiness system, as long as individual reservists have the right course qualifications, this could be addressed during mobilisation before operations, but it is clear that the longer sub-units are left without equipment the more likely it is to negatively impact both morale and collective readiness.

Despite the problems a lack of equipment was causing, a number of sub-units did report improved training opportunities in the wake of FR20:

'Now we are part of a battalion, our training is more REME orientated, whereas before, because we were part of a Royal Engineers regiment and we would go training with them... we just sort of fell in alongside them and did what they were doing, whereas now... because we are part of a battalion, our training is more focused on us and the stuff that we need to do and need to learn.'<sup>676</sup>

'I think we're more capable of doing the job, because we've got more resources now, more manpower...'<sup>677</sup>

'One thing I've noticed is you get more opportunities to do more live taskings... it used to be up to a few years ago... "No, you can't go." "I'm not letting the TA go on that." Whereas now, for these port tasking groups, they can't get enough guys to go on it so it ends up with 50percent regulars, 50percent reservists.'<sup>678</sup>

Given that FR20 aimed to increase the capability of these sub-units, these quotes indicate that progress is being made with training despite the difficulties outlined above, and there was evidence that access to equipment was improving as the research progressed.<sup>679</sup>

A related issue concerned the conduct of training with regulars. FR20 stated that reserve units would be paired with their regular counterparts to achieve better integration under the Whole Force concept. Interview groups were therefore asked their thoughts on pairing and whether they had conducted frequent training with the regulars

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<sup>675</sup> Interviews 1,6, 14.

<sup>676</sup> Interview 5.

<sup>677</sup> Interview 6.

<sup>678</sup> Interview 1.

<sup>679</sup> Field notes, 21 February 2016.

since FR20 was introduced. Complimentary quantitative data revealed that within the wider RLC/REME reserve population some of the most negative attitudes to reserve service were related to the amount of training undertaken with regulars,<sup>680</sup> but responses were more varied across the sub-units that were interviewed. Some units that had trained with regulars were satisfied with the quality of training and how they had been treated by their paired units;<sup>681</sup> others reported few opportunities to train but blamed this mainly on transition;<sup>682</sup> while some sub-units had negative experiences of working with regular units.<sup>683</sup> While this variance is to be expected and likely reflects both reserve sub-units' differing transition schedules and the different command climates within regular units, increasing regular-reserve collective logistics training opportunities was identified by the army as a key method of delivering both better integration and reserve retention in the wake of quantitative data collection. The evidence presented here compliments this data in this regard, and suggests that more could be done on the issue.

Despite the importance of collective training to deliver capability – both in reserve centres and with the regulars – the fundamental determinant of whether sub-units will successfully re-trade on schedule rests on their ability to train, or re-train, individuals to the standard required of their rank in their new specialism. As a result, the ability of sub-units to get reservists on specialist trade courses is central to the success of their transition. Without individuals trained to the required standard, these sub-units simply cannot provide the required number of trained personnel to deliver the increased capability expected under FR20. As such, courses are critical to understanding the trajectory of transition in sub-units that have re-traded; they are the building blocks of sub-unit capability. Although there was some evidence of problems with the availability

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<sup>680</sup> Bury, 'Recruitment and Retention in British Army Reserve Logistics Units'.

<sup>681</sup> Interviews 1, 10.

<sup>682</sup> Interview 7.

<sup>683</sup> Interview 5.

of RLC courses in particular,<sup>684</sup> across the sub-units there was a general acknowledgement that FR20 had dramatically increased course availability to members.<sup>685</sup> For example:

'I think, since we've been here, the support's a lot better. I think personal development's a lot better...'<sup>686</sup>

'The PSIs [Permanent Staff Instructors] have done fantastic by getting people on courses.'<sup>687</sup>

'It's still in-hand. We're mainly smashing through getting people the right licences. As soon as they've got the right licences, we're getting them on the trade courses to get them to that level. Again, it takes time.'<sup>688</sup>

'[The availability of courses is] a good thing that should be publicised more, I think. If you've got the time to put in to it, you're going to near enough get what you want out of it.'<sup>689</sup>

Numerous other sub-units were equally complementary about their regular PSI's efforts. However, at an organisational level, given that individual proficiency provides the foundation on which sub-unit capability rests, the better availability of courses post-FR20 is to be expected.

Nevertheless, the interviews and fieldwork revealed major frictions associated with re-training entire sub-units that indicate serious, and perhaps fundamental, weaknesses in the FR20 plan to transform these units. Of these issues the most serious concerned the tiered progression of specialist trade courses that are tied to the rank structure. For example, to qualify as a Sergeant in a port unit, a reservist would be expected to have completed their class B3 course indicating that they can safely operate numerous heavy vehicles used to load and unload ships in a number of conditions, and direct their safe use as well. To get this qualification a reservist would have first had to complete his class B1 qualification course, gain two years' experience in trade and complete complimentary modules, then complete his B2 (perhaps as a Corporal), wait

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<sup>684</sup> Field notes, 8 May 2015; Interview 1.

<sup>685</sup> Interviews 1, 5, 7, 14.

<sup>686</sup> Interview 5.

<sup>687</sup> Interview 6.

<sup>688</sup> Interview 6.

<sup>689</sup> Interview 12.

another two years and complete further modules, before finally completing his B3 and qualifying as a port Sergeant. In the current system, this would take a reservist a minimum of six years if completed as quickly as possible. Re-roling sub-units has therefore created a situation whereby higher ranks – those vital NCOs with deep trade experience upon whom sub-units rely to deliver training and capability – must now learn a new trade. They are effectively in a rank without the relevant professional skills demanded of their trade. While the training problem was less severe for junior soldiers who simply follow the new trade progression, given the timelines involved in gaining trade experience and relevant qualifications, and the pressures on reservists' time, the depth and scale of transformation in sub-units that have been directed to re-role cannot be overstated.

Overall, the difficult reality of re-trading reservist logisticians was starkly apparent in sub-units that had re-roled. The interviews below provide context for the impact these changes have had on both individual members of these sub-units, and collective capability:

- R1: 'You're doing your B3, your B2, your B1. You're probably looking at about five or six years.'
- R2: 'Whereas we're all a little bit screwed, those that have come across from the Signals. I was a Class 2 CS [Communications Specialist] op[erator] and now I've had to go all the way back to the very beginning to sit my B3 course. I can't get promoted to full screw [Corporal] until I've got B2 upgrade and I've got my HGV licence. I've got a job. How on earth can I ever fit this in?'
- R1: 'Just to do the track licence that's one week plus three weeks in Bovington. So that's four weeks you've got to take off. That's impossible.'
- R2: '...They've worked it out that it would take us a couple of years to go to the next level.'
- R3: 'That's providing you've done all the courses.'
- R2: 'So we're in a situation where we're pretty fucked.'
- R4: 'Which... when they sold it to us, that wasn't actually explained.'
- R5: 'It is a really good trade. There is lots of opportunities and it's good fun, but to get there...'
- R1: 'The best position to be in, coming across, would be as a private.'
- R6: 'I've come across [as a private]... So I did two weeks [last year]. This year I will do two weeks VS. Then I'll be in the same boat as everyone'

else. Once I've got that class 3, how do I get to class 2 if I can't take four weeks off of work at a time?''<sup>690</sup>

- R1    'You're starting from scratch...  
R2: [It will take] Anything between four or five years getting back to a B1.  
      But you've got to be rank structured as well.  
R3: And you have to have the time.'<sup>691</sup>

'We've got a lot of guys that have come in that are not role-specific, so they need to be beefed up to the training levels required. The soldiers that are transferred across [in trade], that's a given, but we've also got soldiers coming in through the door. Now, when we make the offer, we say, 'Come and join us, you'll do your training. You will then go and get your driving licence. You'll be converted across.' So we've got quite a big backlog of training that needs to be done. We can't organise sub-unit training during training times because we haven't got the kit on-hand. There's a certain amount of hours that people need to do behind wheels to prove competency, to make sure that they're road legal. I really don't think the higher echelons understand the training bill for a Reservist to get in, in his or her 27 days, because that is what they're committed to.'<sup>692</sup>

Apart from the importance of the sheer amount of time required for reservists to re-trade, the loss of experience and knowledge – and an acknowledgement that this cannot be gained simply on courses – were also frequently highlighted:

- R1:    'For me, as a full screw RLC now, you've lost nine years' experience.  
      So when somebody asks you something, you honestly don't know.  
R2:    We've got a long way to go, but we need the kit to do that.  
R1:    The courses might be [there] but the experience won't be...'<sup>693</sup>

'By the book, we've got people that are already trained, but they don't have the knowledge. They've done the courses. Fine. The knowledge takes time. It's one thing doing a B3 course or a B1 course, but until they've been on the ground and done the exercises, then they're not going to have the experience.'<sup>694</sup>

This need for further training and deep experience is enshrined in the qualification process itself, but in order to expedite this process it appeared that reservists may be allowed to attend courses without gaining the required amount of experience. As alluded to, such a practice is not without risk and, paradoxically, may actually increase the gap in real-term capability between the regular and reserves that FR20 was designed to decrease.

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<sup>690</sup> Interview 1.

<sup>691</sup> Interview 10.

<sup>692</sup> Interview 6.

<sup>693</sup> Interview 5.

<sup>694</sup> Interview 6.

As highlighted above, the need to re-train soldiers, and in particular NCOs, may also negatively affect their careers. While a two-year dispensation was initially given to NCOs in new trades that don't have the relevant qualifications in the wake of FR20 implementation,<sup>695</sup> re-trading was seen as potentially detrimental to their promotion:

- R1: ‘In this squadron, if you look around the different ranks, there is only possibly three people who are qualified to move to Staffy [Staff Sergeant], one person who is qualified to move to Warrant Officer, and that's because they came across with their trades already intact. But the guys who have come across are in an unfortunate position where they miss out.
- R2: In limbo.
- R3: Career failed.
- R4: Well, they are not career failed because everyone has to go through same retraining progress so it's not a career fail. In my personal opinion, it's not, because you've got five or six seniors who all have to go through the same training process.’<sup>696</sup>

The diverging opinion expressed by the last respondent is interesting as it suggests that as the re-trading has affected all senior ranks uniformly, the competition for promotion between them has therefore remained the same. While true, this view does not appreciate that this practice effectively delays these ranks' promotion, pay and seniority compared to if they had remained in trade. This was explained by one senior rank:

‘And the transition side, actually... I will say, and I am positive about the transition.... [But] personally, one of the biggest knocks was promotion, from senior NCO, probably corporal, up... Because the way the trade is, to get from B3 to B1, it's six years. So... a sergeant, that was a B1 transport sergeant, could be staffy [staff sergeant] within two years of a sergeant. But realistically a B3 to a B1 [maritime skilled] ganger, six years. So that sergeant, now, has got to stay a sergeant for six years... so this is going to be a long while... six years to get class 1. We've got to have a class 1 on a Mexeflot...’<sup>697</sup>

Similar views were expressed in other units that had re-traded.<sup>698</sup>

It is also interesting note how the need to re-trade was viewed by some senior ranks as indicative of the limits of the Whole Force concept in general, and how the reserves remained separate from the army in particular. For example:

- R1 ‘If it's supposed to be one army, you've actually achieved a rank. And with that rank, you've got additional management experience.

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<sup>695</sup> Interview 22.

<sup>696</sup> Interview 2.

<sup>697</sup> Interview 11.

<sup>698</sup> Interview 6.

Management experience is supposed to cut across the army and it doesn't seem like that has actually been taken into account. So we are not one army. We are still the individual corps.

R2: I think you've hit in on the head. We're not one army. We never will be.

R3: That's right.

R1: ... This new strapline of one army doesn't work because it's not one army.... It can't be. It physically can't be because we are on two different levels and they need to stop pushing that because [it] winds everyone up.<sup>699</sup>

Similarly:

'They say it's one army but it's got two separate pay scales'<sup>700</sup>

What is clear from the above comments is that FR20 has created extensive organisational friction in these sub-units concerning the realities of re-trading and its impact on careers. During the research period, it became clear that higher command was aware of the scale of challenge re-trading already qualified NCOs posed. Although much uncertainty remained, there were suggestions that trade-qualified NCOs would keep their old trade and be promoted without the required trade specific courses.<sup>701</sup> In this scenario, junior soldiers would continue to train for the new trade, while seniors would not be required to do so. Sub-units would therefore lack experience of their trade at the senior rank level, and without help from other units this would clearly affect collective training. Either way, the juxtaposition between re-trading to deliver the required operational capability and correctly managing career progression cannot be easily solved. While on the one hand the re-trading issue underscores the considerable organisational friction that FR20 has generated between the delivery of collective capability and the correct career management of reservists, on the other it indicates that transformation in these sub-units is almost certain to take longer than FR20 originally envisaged. Again, given the history of the previous periods of reform this is hardly surprising.

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<sup>699</sup> Interview 2.

<sup>700</sup> Interview 5.

<sup>701</sup> Interview 22.

## **Can these sub-units deliver?**

What do the above findings tell us about the impact of FR20 on these sub-units to date?

Clearly, sub-units have had different experiences, and generally it was noticeable that those that had experienced the least amount of organisational change appeared to be the most content about FR20. It is also important to stress that by the completion of research in summer 2016, FR20 was only a little over half way through its projected lifespan. The interviews also revealed that many soldiers had not passed final judgement on FR20 yet:

‘In a couple of years’ time, we’ll know whether the plan was a good one or not, probably too early [now].’<sup>702</sup>

‘There’s lots of changes going on, but it’s a bit early to say whether they’re for the better or for the worse. [So far] I think they’re better, from a REME point of view, simply.’<sup>703</sup>

Interestingly, this last position had noticeably changed a year later in the same unit:

- Mod: ‘Do you think in your experience FR20 has been positive? What’s the general consensus?’
- R6: Mixed.
- R2: Mixed.
- R6: I think it’s good for the fact that we bring in loads of people in and get the numbers up, but I think it’s bad for retention.
- R2: Lots of stuff that should be happening is now slipping, like the kit and the training aids and stuff like that.’<sup>704</sup>

As a result, although this chapter utilised longitudinal data, the long term nature of FR20 limits the ability of this chapter to provide a definitive answer about the policy’s impact on the sub-units in question. Nevertheless, a general sense of what FR20 has achieved to date, the rate of change, and its future trajectory, can be ascertained.

Recruitment, equipment and training are some of the most important ‘hard’ factors that will determine if these sub-units can deliver the operational capability required by FR20. To ascertain whether those in the selected sub-units thought this possible given FR20’s impact to date, respondents were asked whether they believed

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<sup>702</sup> Interview 2.

<sup>703</sup> Interview 8.

<sup>704</sup> Interview 12.

FR20 would ultimately prove successful. Again, there were mixed responses, with the following opinion from an NCO in a sub-unit that had not re-roled reflective of others commonly aired: ‘On paper they’ll succeed, whether you’ll see a huge difference on the ground is another matter.’<sup>705</sup> Meanwhile, it was widely acknowledged that re-traded sub-units had become ineffective as a result of FR20, and it would take years to re-develop this in a new trade. As one officer remarked:

‘So for six years, if we’re lucky, we will be ineffective or we’ll need to borrow the senior guys [from other sub-units in the same regiment]. How does that help unit cohesion, integrity and all that stuff? It doesn’t. Like I said, we’re never going to have a ganger, a sergeant, because it’s six years, [but] we can probably end up providing, with help from [other sub-units]. We could then put all our resources together and provide... But as a squadron, independent, with the manpower we’ve got, and the trade [issue]... We can’t do it.’<sup>706</sup>

This belief that their sub-unit would not ultimately prove able to provide the FR20 capability requirement was repeated in other sub-units, but it was also challenged:

- R1: ‘We’ve still got a long way to go.
- R2: Will we be able to [provide] 40 personnel? No.
- R3: I disagree. I personally think by 2017 we could have 30 odd people ready to deploy.
- R2: They would be deployable. They have done the courses. They’ll have the fitness, but...
- R1: It’s the knowledge.
- R2: Experience.
- R4: You need to be competent before you can be deployed, because otherwise you’re putting people at-risk. They will go at-risk. They will then have a really bad time...
- R3: I understand that... To gain the experience, they need the kit and equipment. My argument is yes I would say, by 2017, we will have between 30-odd people ready to deploy, as long as we have the equipment to put them on the road and ready for deployment.’<sup>707</sup>

‘No, we’re not ready. We’ve only been formed six months and next year they’re expecting us to be at high readiness state. No. Definitely not.’<sup>708</sup>

- R1: ‘We will be in the same position we are in two and half years.
- R2: I don’t think we will.
- R3: If things don’t change, then yes we will.
- R2: But we’re changing that now.
- R4: We could do it [deploy a section] now.
- R1: ... In two and a half years, we’ll still be able to deploy a section
- R2: But it would be top-heavy.
- R3: ... It would be top-heavy because of our trade.’<sup>709</sup>

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<sup>705</sup> Interview 12.

<sup>706</sup> Interview 11.

<sup>707</sup> Interview 6.

<sup>708</sup> Interview 8.

This identification of the ‘top-heavy’ nature of sections refers to the deployment of senior ranks in junior positions in order to provide capability. As such, it reflects the perceived inability of sub-units to fill each section with the required trade skills relevant to rank. Critically, it indicates that, because these sub-units would be forced to deploy more of their senior ranks in the first roules of a deployment, their capacity to continue to deliver the same capability in subsequent roules would be severely limited. It therefore indicates potentially major problems in the tiered readiness system within which these sub-units are meant to provide capability. As an officer elucidated:

[This sub-unit must provide] a half section for roule one and then a full section for roule two, three and four, right up to eight. Now, [there] is an interesting mathematical conundrum at this point... because I'm supposed to have five years' worth of [deployable reservists], and I've only got four. So my last two roules, either I cover them with the first two or... we can train specialists in that length of time, so that my ninth and tenth roules are covered by people who are not yet through the door... [But] I would actually say it [the tiered readiness cycle] is a wise idea. It's something that can work. We cannot do it on existing philosophies, but I think we've done quite well in adjusting philosophies to make things happen. Am I capable now of delivering a section? Probably, yes. Am I able to deliver a section, plus a section into the barrel for six months' time? Probably, yes. But beyond that, I'm going to work quite hard and I know that. It's something that I've known for over a year. And we're making great progress. But, as regards Full Operation Capability, I don't think we'll ever get it, because it means that everybody has to be trained all the time.<sup>710</sup>

Interestingly, officers and soldiers in other sub-units also identified this weakness in the roule system, but were less positive about their ability to bridge the capability gaps they identified in the sixth year of a deployment.<sup>711</sup> Such a finding raises serious questions as to the long term sustainability of the reserves logistics components contribution to the Army2020 deployment system, and, more generally, of the Whole Force Concept.

To gain an accurate picture as possible of the impact of FR20 to date, items on this topic were also included in the surveys, which were distributed to a wider sample

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<sup>709</sup> Interview 2.

<sup>710</sup> Interview 3.

<sup>711</sup> Field notes, 21 February 2016.

that was less weighted toward units which had undergone organisational transformation. The results of this section in the survey were more positive than those from the group interviews, but still some of the least positive opinions expressed in the surveys overall. Perhaps the most important baseline statistic concerning the impact of FR20 to date is recorded in the item concerning respondents' optimism that the reforms will increase their sub-unit's capability. On average 54 percent said they 'Agreed' or 'Strongly Agreed' with the proposition, 30 percent 'Couldn't Say', and 16 percent said they 'Disagreed or Strongly Disagreed'. In terms of perceptions of sub-units becoming better at their job as a result of FR20, the jury is still largely out, as 43 percent stated they 'Couldn't Say', while 38 percent 'Agreed' or 'Strongly Agreed'. Only about 32 percent agreed that there had been better equipment as a result of FR20, and this item recorded some of the least positive results in the entire survey, suggesting that the flow of better equipment into sub-units has been moderate at best. In terms of FR20 delivering better integration with the regulars during training there were slightly more positive results, with 33 percent stating that they agreed this had occurred in their sub-unit. However, 24 percent of both cap badges recorded 'Disagree' or 'Strongly Disagree' responses. Supported by other findings above, and previous research, this indicates that increasing training with the regulars has not been fully met yet.

Despite the varying experiences of transformation and differing opinion on its likelihood of success, this chapter has shown that FR20 has already had major impacts on the sub-units examined. Many of these were foreseen at the outset of FR20 implementation; some have been unintended. Overall, how the policy was implemented has created considerable organisational frictions in these sub-units, with many long-term issues still outstanding. FR20's emphasis on recruitment has come at the expense of training, which, paradoxically, can pose a threat to retention. The numbers game has also raised questions about the quality of recruit and whether they will remain

committed to service with these sub-units in the longer-term. Perhaps most importantly, the need to recruit to target for political reasons has caused accounting practices to develop that lack transparency and have ultimately forced commanders to play politics.

The impact of certain post-Fordist logistics structures and management processes on equipment, infrastructure and even recruiting in these sub-units has also been evident. The centralisation of logistics equipment, especially vehicles, has reduced the amount of training time for many sub-units on a number of their key equipment platforms, whilst also increasing the complexity of, and human resources needed to, conduct trade training. Similarly, the evidence suggests that within this sample, the Whole Force Concept is yet to be fully implemented, with reservists concerned about the lack of availability of equipment and training with the regulars. Meanwhile, the centralisation of reserve sub-units in larger base locations has resulted in improved command and control in some sub-units, but also infrastructure and recruitment problems in others. The sale of Marchwood port is particularly instructive as it indicates the negative impact that rationalising military infrastructure can have on reserve units whose time is more limited. Similarly, the centralisation and outsourcing of the previously localised reserve recruitment process to a civilian firm has caused major impediments for the reserves. While some of these issues are being addressed, overall the evidence suggests that while the post-Fordist approach to logistics may deliver efficiencies for the regular army, it has not been designed or implemented with the reserves in mind, it may create more problems than it solves. It is arguable that, given their part-time nature and more local dispersal, the post-Fordist approach is far less efficient and useful to reserve sub-units than it is to their regular counterparts.

Despite FR20's promises of investment, many sub-units are therefore suffering from a lack of equipment and infrastructure, and this has negatively impacted training. While there was an acceptance in the sub-units that equipment and infrastructure issues

are being addressed, that they existed was perceived as a result of poor management by higher command and the politically-imposed nature of FR20. This failure to resource these logistics sub-units from the outset has clearly impacted positivity about FR20 in the selected sub-units, and is related to the ad hoc nature of FR20's development. Decisively, this chapter has also shown that in sub-units that have re-roled, re-trading has created a situation whereby some sub-units are likely to take six years or more for them to deliver even their IOC. While some sub-units may be able to deliver IOC on schedule, real transformation in many sub-units is likely to take longer than the April 2019 date by which FR20 is due to be completed. Similarly, even if reservists are pooled at the unit level in order to deliver the required capability for initial deployment roules, such are the organisational challenges created by FR20 in these sub-units that many of them will lack the capacity to sustain their contribution to later deployments, thereby jeopardising the tiered, rotational readiness structure, not only for reservists in these sub-units, but also in the regular units they are designed to support. And this is notwithstanding the longer-term issues for reserve sub-units identified within the rotational system itself. As a result, in the case of the reserve logistics sub-units studied in this chapter, it currently appears that they many are unlikely to be able to deliver the capability required under FR20 on schedule. While some, especially REME companies, will, and most are likely to meet demand of at least their first allocated roulements, given the scope of the organisational changes experienced, it appears that many will struggle to provide the enduring capability envisaged by FR20 – and upon which the army relies for Army2020 to function – for many years to come.

## Chapter Seven

### Sub-Unit Perceptions of Cohesion, Readiness and FR20

The last chapter presented qualitative evidence from sub-units on their ability to meet the capability requirements set by FR20. This chapter uses the Standard Model to examine quantitative data from a wider sample of reserve logisticians to assess perceptions of cohesion and readiness, experiences of FR20 to date, and the impact of these experiences on cohesion over time. The research presented in this chapter has three aims. Firstly, sub-unit cohesion, readiness, and experiences of FR20 are examined at both the individual and sub-unit levels to gain an understanding of reserve logisticians' perceptions of these issues. Secondly, advanced statistical analysis is undertaken to isolate background characteristics to inform policy makers, and show how reservists' perceptions of cohesion influence readiness and morale. Finally, three sub-units with high internal consistency are then used to measure how the FR20 reforms impacted these perceptions over time. Throughout, in order to compliment the qualitative data presented in the next chapter, I make comparisons with data from a regular infantry and a regular logistics sub-unit to elucidate differences between reserve and regular perceptions of cohesion.

Following previous cohesion and readiness research in a number of Western armies, this chapter presents the first known quantitative research specifically focusing on perceptions of cohesion and readiness in the British Army Reserve. The issue was of direct interest to the Capabilities Director, Combat Service Support, who is the senior officer in charge of delivering logistics capability across the British Army, and who part-financed the surveys undertaken on his behalf. Two levels of analysis are used. A statistically significant sample of the RLC/REME population is utilised to illustrate

perceptions in this wider group, while eight sub-units where survey response rates were the highest were also selected to provide data at the sub-unit level of analysis. The sub-unit level was utilised as it provided more stable sample groups for longitudinal comparison. The aim was to produce statistically significant findings reflective of the wider Army Reserve RLC and REME population. This could then be used to inform the chain of command on the impact of FR20 in reserve logistics sub-units where some of the organisational changes outlined under the transformation have been the most profound. While the sample was statistically representative in the first tranche of data collection in 2015, in 2016 responses were much lower, and thereby it should be stressed that the longitudinal sub-unit comparisons, while internally highly statistically valid, are only indicative to, not representative of, the wider REME/RLC population. The findings concerning sub-unit changes overtime therefore represent an initial sketch of British Army regular and reserve cohesion, rather than a definitive conclusion. Importantly however, the results of the 2015 data are all representative of the wider population.

### **The Standard Model of Cohesion**

Military group cohesion is complex and difficult to measure, with many definitions and level of analysis issues. The cohesion debate and the different methodologies associated with each side of it have been discussed in the literature review, as has the widespread acceptance amongst cohesion academics that it is essential for successful military group performance. The review also revealed a lack of quantitative data on cohesion and readiness amongst the British reserve in general, and the logistics component in particular. This chapter seeks to address this gap in the literature. To do so, it draws on previous quantitative cohesion studies conducted in the US and other Western militaries to examine cohesion using the Standard Model. A useful classical definition of cohesion under the Standard Model has been provided by Guy Siebold: ‘The level of unit

cohesiveness is defined as the degree to which mechanisms of social control operant in a unit maintain a structured pattern of social relationships between unit members, individually and collectively, necessary to achieve the unit's purpose.<sup>712</sup> While King has challenged this view<sup>713</sup>, and his approach is used in the next chapter, in this chapter the Standard Model is used to measure cohesion. Following Siebold's definition, three basic components of unit cohesion were originally identified: horizontal, vertical, and organisational. Each component was conceived of having an affective (emotional or feeling, known as social cohesion) aspect and an instrumental (action or task, known as task cohesion) aspect. The components of small unit cohesion listed with their affective and instrumental aspects, respectively, are: (a) horizontal cohesion (peer bonding and teamwork); (b) vertical cohesion (leader caring and leader competence); and (c) organisational cohesion between soldiers and their units (pride and shared values, and attainment of needs and goals). More recently, a fourth component, institutional bonding – referring to the ties between group members and their wider branch of service and with similar aspects to the organisational component – has been argued to exist.<sup>714</sup> Within the Standard Model, leadership and shared organisational goals have been shown to be strongly related to organisational and peer bonding in particular.<sup>715</sup>

### **Standard Model Cohesion Components**

	<b>Affective</b>	<b>Instrumental</b>
<i>Horizontal Bonding</i>	Peer Bonding	Teamwork
<i>Vertical Bonding</i>	Leader Caring	Leader Competence
<i>Organisational Bonding</i>	Unit Values & Pride	Unit Rules & Norms
<i>Institutional Bonding</i>	Army Values & Pride	Army Rules & Norms

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<sup>712</sup> Siebold, G. (1999) 'The evolution of the measurement of cohesion', *Military Psychology*, 11(1), 18.

<sup>713</sup> King, *The Combat Soldier*.

<sup>714</sup> Salo, M. and Siebold G. (2005) 'Cohesion component as predictors of performance and attitudinal criteria', unpublished paper presented at the Annual Meeting of the International Military Testing Association, Singapore, 7-10 Nov.

<sup>715</sup> Bartone, P., and Kirkland, F. (1991) 'Optimal Leadership in Small Army Units', in R. Gal and A. Mangelsdorff (eds) *Handbook of Military Psychology*, Chichester: Wiley; Griffith, J. (2002) 'Multilevel Analysis of Cohesion's Relation to Stress, Well-Being, Identification, Disintegration and Perceived Combat Readiness', *Military Psychology*, 14(3).

Two main instruments, each involving questionnaire items asking soldiers about their perceptions of cohesion, are used to measure each aspect of each component.<sup>716</sup> Siebold and Dennis Kelly's Platoon Cohesion Index (PCI) is considered to be the conceptually clearest way to measure cohesion at the platoon or sub-unit level. The 20-item questionnaire PCI is a shortened version of the 79-item Combat Platoon Cohesion Questionnaire (CPCQ) developed after extensive research on behalf of the US Army in 1986-87,<sup>717</sup> and clusters items onto scales to measure each aspect of each component, with scales composed of two items each.<sup>718</sup> Analysis has shown that three factors are formed and there is one factor for each cohesion component. Interscale correlations range from .6 to .9, with the most typical being about .7. All of these components have been significantly correlated with subsequent group performance in numerous studies.<sup>719</sup> The PCI and its variations have also been used to measure cohesion in surveys of units in the US, Israel, Norway, Canada and Finland.<sup>720</sup> The results of the PCI have matched commanders' assessments of their unit's cohesiveness, and have also been shown to have predictive validity with unit performance on training exercises.<sup>721</sup> A recent study conducted on behalf of the MoD – with advice from occupational psychologists – on the impact of females on combat units in the British Army also

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<sup>716</sup> Siebold, G. and Kelly, D (1988) *The Development of the Platoon Cohesion Index*, Washington: Army Research Institute.

<sup>717</sup> Siebold and Kelly, *The Development of the Combat Platoon Cohesion Questionnaire*; Marlowe, D. (1985) 'New Manning System field evaluation' (Tech. Rep. No. 1). Washington: Walter Reed Army Institute of Research, Department of Military Psychiatry.

<sup>718</sup> Siebold and Kelly, *The Development of the Platoon Cohesion Index*, 5.

<sup>719</sup> Beal, D. et al. (2003) 'Cohesion and Performance in Groups'; MacCoun and Hix, 'Cohesion and performance', in National Defense Institute, *Sexual orientation and US military policy: An update of RAND's 1993 study*, Santa Monica: RAND, 141-142; Mullen, B. and Copper, C. (1994) 'The Relation between Group Cohesiveness and Performance: An Integration', *Psychological Bulletin*, 115, 210-227.

<sup>720</sup> Salo, M. (2011) *United We Stand – Divided We Fall*, Helsinki: Department of Social Research, University of Helsinki; Gal, R. (1986). 'Unit Morale: From a theoretical puzzle to an empirical illustration--An Israeli example' *Journal of Applied Social Psychology*, 16, 549-564; Siebold, G. (1996) 'Small unit dynamics: Leadership, cohesion, motivation, and morale' in Phelps, R. and Farr, B. (eds), *Reserve component soldiers as peacekeepers*, Virginia: US Army Research Institute for the Behavioural and Social Sciences.

<sup>721</sup> Siebold and Kelly, *The Development of the Platoon Cohesion Index*.

utilised the longer CPCQ method.<sup>722</sup> As a result, both the CPCQ and the PCI are tried and tested methods used to measure unit cohesion; the shorter PCI was utilised in this study for brevity. The second instrument is the questionnaire used by James Griffith on his research in the US Army, which Griffith adapted from long-standing survey research on unit cohesion in the US.<sup>723</sup> However, Griffith's cohesion scales are arguably less accurate than the PCI for measuring cohesion, and a slightly adapted version of the PCI, modified to reflect the sub-unit level, is used in this study.

While there is strong evidence for an association between cohesion and performance, the relationship is bi-directional, i.e positive performance can increase group cohesiveness. However, in this study, positive performance is viewed as a desired outcome of the FR20 reforms. Therefore, data reporting increases in sub-unit cohesion due to better performance does not invalidate but rather strengthens the findings. Similarly, it is worth noting that these high quantitative associations between cohesion and performance fall short of full causal links: unit cohesion is too complex and dependent on a myriad of difficult-to-quantify variables to prove causality. Interestingly, a review of the standard model literature revealed a limited number of longitudinal studies of cohesion.<sup>724</sup> Of most importance to this study is Siebold's examination of cohesion in US Army and National Guard units before, during and after their deployment on peacekeeping mission in the Sinai. This study used scales measuring cohesion and morale derived from the CPCQ in a similar fashion to the PCI, and compared mean scores on each scale over time. A similar approach is followed here.

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<sup>722</sup> Berkshire Consultancy (2010) *Study of Women in Combat – Investigation of Quantitative Data*, available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/27404/study\\_woman\\_combat\\_quant\\_data.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/27404/study_woman_combat_quant_data.pdf), retrieved 7 September 2016.

<sup>723</sup> Griffith, 'Measurement of Group Cohesion in US Army Units', 162.

<sup>724</sup> One exception is Siebold, 'Small unit dynamics.'

Meanwhile, military readiness can be defined as the ability of military forces to fight and meet the demands of the national military strategy. At the sub-unit level, readiness refers to the unit's ability to carry out assigned missions. Despite numerous other definitions of morale,<sup>725</sup> this study uses that provided by Ingraham and Manning, and also used by Reuven Gal: 'A psychological state of mind, characterised by a sense of well-being based on confidence in the self and in primary groups.'<sup>726</sup> While Griffith's 1988 paper on group cohesion in US Army units does not provide as accurate a measure of cohesion as the PCI, it is very useful in terms of expanding on soldiers' perceptions of unit readiness and morale not directly addressed in the PCI. Specifically, it included 19 items from the Combat Readiness Morale Questionnaire (CRMQ) developed by Gal to measure soldiers' perceptions of group and individual readiness and morale in the Israeli Defence Forces,<sup>727</sup> as well as other items previously used by the US military. Crucially, Griffith has shown that measures of sub-unit readiness, such as soldier morale, confidence in leaders, willingness to deploy, and confidence in weaponry and equipment have also been shown to be strongly influenced by perceptions of unit cohesion.<sup>728</sup> Griffith also reported positive relationships between soldiers' perceptions of cohesion and levels of individual morale. To ground the data in previous research and allow comparisons to be made, similar items measuring readiness and morale were adopted in this study.

Finally, to gain an accurate picture of the impact to date of FR20 on respondents' sub-units, it was necessary to generate a sub-set of items specifically addressing this issue. Other sub-sets consisted of items concerning reservists'

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<sup>725</sup> See Gal, 'Unit morale: From a theoretical puzzle to an empirical illustration'.

<sup>726</sup> Ingraham, L. and Manning, F. (1981) 'Cohesion: Who needs it, what is it, and how do we get it to them?' *Military Review*, 61(6).

<sup>727</sup> Gal, 'Unit morale: From a theoretical puzzle to an empirical illustration'.

<sup>728</sup> Griffith, 'Measurement of Group Cohesion in U.S Army Units', 162.

experiences of working with the regulars, and items asking about the importance of professional performance *vis a vis* social bonds in reserve logistics sub-units.

It will be remembered that the survey hypotheses was discussed in Chapter Two, while survey design and scale validity details are in Annex A. The research aims and hypotheses are presented again here for clarity. Based on the overview of the Standard Model literature, this study set out to achieve the following:

- a. For the first time, gather cohesion and readiness data at the individual and sub-unit levels from RLC and REME reservists, complimented by data on their experiences of working with the regulars and on the impact of the FR20 transformation to date.
- b. Use three RLC sub-units to examine the impact of FR20 on their perceptions of cohesion and readiness over time.
- c. Compare data between RLC and REME sub-units and both regular RLC and infantry sub-units to initially examine any differences between reserve and regular sub-unit cohesion.
- d. Determine whether the PCI is an accurate and useful tool when applied to the British Army Reserve and whether it may aid 360-degree reporting.

Hypothesis 1: Reservists' perceptions of cohesion and readiness should increase as a result of the FR20 transformation as the force professionalises and better equipment, training, and resources are directed toward the reserve logistics population in general and specific sub-units in particular.

Hypothesis 2: Following previous research, sub-units with higher cohesion should report higher levels of readiness and morale.

Hypothesis 3: Given the importance of social bonds in the reserves (See Chapter Eight), reserve sub-units should display higher scores for affective (social) bonds on the PCI

scales than their regular colleagues. Conversely, regular sub-units should report higher instrumental (task) bonds.

**Table 1.  
2015 Sample Background Characteristics Comparison with Army Reserve Population**

<b>Background Characteristic</b>	<b>Sample</b>	<b>Total Volunteer Reserve, including Army Reserve Gp A</b>
<b>Gender</b>		
Male	87 %	86.9 %
Female	13 %	13.1 %
<b>Age Gp</b>		
18-24	9.1 %	15.2 %
25-34	25.8 %	31.2 %
35-44	27.2 %	25.8 %
45-54	33.5 %	23.3 %
55-64	4.4 %	4.5 %
<b>Rank</b>		
Officers	11 %	17.8 %
Other Ranks	89 %	82.2 %

Source: MoD Statistics, Reserves and Cadets: June 2015

### **Sample Characteristics**

In terms of ranks, over half (52 percent) of respondents were Privates, Lance Corporals or Corporals, with a further 27 percent Sergeant – Warrant Officer Class One. Officers were under-represented at statistically significant levels. 51 percent of the sample had GCSEs, and 38 percent had some college education or above. In terms of time in service, the distribution was skewed toward longer serving (older) soldiers. 20 percent had served 0-3 years; 25 percent 4-9 years; 13 percent 10-15 years, and 43 percent had served over 16 years.

To generate a total cohesion score to enable easier longitudinal comparison, a scale was created to include all the PCI cohesion scales. Details of the cohesion components and the PCI items that make each component are detailed below.

**Table 2.**  
**PCI item loading on scales**

<b>Cohesion Component Scale</b>	<b>Platoon Cohesion Index Items</b>
<i>Horizontal Bonding (HB)</i> HB-Affective (HB-A)	3. Privates/Craftsmen trust each other in this sub-unit; 4. Privates/Craftsmen in the sub-unit care about each other
	7. Leaders in this sub-unit trust each other; 8. Leaders in this sub-unit care about each other
	5. How well do Privates/Craftsmen in your sub-unit work together to get something done? 6. Privates/Craftsmen in this sub-unit pull together to perform as a team.
<i>Vertical Bonding (VB)</i> VB-Affective (VB-A)	9. Privates/Craftsmen in this sub-unit can get help from their leaders for personal problems; 10. Leaders and Privates/Craftsmen in this sub-unit care about each
	11. Leaders and Privates/Craftsmen in this sub-unit train well together; 12. Leaders in this sub-unit have the skills and abilities to lead Privates/Craftsmen on operations
<i>Organisational Bonding (OB)</i> OB-Affective, Values (OB-A, V)	1. Privates/Craftsmen in this sub-unit uphold and support Army values; 2. Leaders in this sub-unit set the example for Army values.
	15. Privates/Craftsmen play an important part in accomplishing the sub-units mission; 16. Privates/Craftsmen/JNCOs are proud to be in this sub-unit
	13. Privates/Craftsmen in this sub-unit know what is expected of them; 14. In this sub-unit the behaviours that will get you in trouble are well known
	17. How satisfied are the Privates/Craftsmen/JNCOs in this sub-unit with the time for family, friends and personal needs? 18. How satisfied are Privates/Craftsmen/JNCOs with social events in this sub-unit?
	19. Privates/Craftsmen/JNCOs in the sub-unit feel they are serving their country; 20. Privates/Craftsmen/JNCOs in this sub-unit have opportunities to better themselves.

The means and standard deviations for the reserve logistics sample at the individual level are presented below.

**Table 2.1.**  
**Individual Means and Standard**  
**Deviations of PCI scales**

Scale	Mean (out of 10)	Std Dev
HB-A	8.01	1.33
HB-A, L	8.00	1.42
HB-I	8.43	1.28
VB-A	8.14	1.30
VB-I	8.12	1.23
OB-A, V	8.19	1.21
OB-A, P	8.31	1.23
OB-I, A	8.08	1.24
OB-I, N	7.38	1.40
OB-I, G	8.04	1.26

The means of each of the cohesion components present the average score at the individual soldier level on each of the scales. The standard deviation shows the amount of variance from the mean that should be expected. As each scale was created from two items, the mean score throughout the 2015 PCI survey was about four for each item, indicating relatively high perceptions across all the components of cohesion. This is an important baseline statistic. It indicates that, allowing for differences in coding, levels of perceived cohesion amongst REME and RLC reservists are similar to those recorded in Siebold and Kelly's research, and subsequent studies of both regulars and reservists.<sup>729</sup> In terms of informing policy, this indicates that in general, and despite substantial organisational changes within some of the sub-units surveyed, these soldiers' perceptions of their sub-unit's cohesion remain relatively high. Indeed, they are comparable to those recorded in regular forces. Overall, these reservists' perceptions of cohesion were therefore positive in 2015.

Of note is that the Organisational Bonding, Needs, scale recorded the lowest scores, indicating that reservists are less satisfied with their amount of time off and social events than other areas of cohesion. More positively, the highest recorded scores

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<sup>729</sup> Siebold and Kelly, *The Development of the Platoon Cohesion Index*; Siebold, 'Small unit dynamics: Leadership, cohesion, motivation, and morale'.

concerned the Horizontal Bonding, Instrumental, scale which records perceptions of lower ranks' levels of team work. This finding was supported by high scores in the Organisational Bonding, Affective, Pride scale which measures lower ranks' pride in their sub-unit and their positive contribution to sub-unit missions. Both Vertical Bonding scales also displayed high means, indicating that leadership in the sub-units is generally perceived as strong and that the relationship between ranks is good. However, perceptions of inter-leader relations were comparatively lower, perhaps reflecting personality clashes amongst leaders in some sub-units. In terms of the renewed effort to inculcate army values in the Whole Force, the results indicate that this is not a problem area amongst REME and RLC reservists, with relatively high levels of agreement with the items concerning leaders setting the example in regards to values, and lower ranks upholding and supporting these values. At slightly lower levels, the Organisational Bonding, Instrumental, Anomie, scale shows that perceptions of discipline are relatively high.

### **Individual Perceptions of Sub-Unit Readiness and Morale**

This section presents the sample responses to a selection of the sub-unit readiness and morale items used by Gal, Vaitkus and Griffith. Again, overall, the results showed relatively high levels of readiness and morale, with few major differences between the RLC and REME. About 33 percent of the sample thought that their sub-unit's readiness was in the high categories, 48 percent in moderate, and 17 percent in the low categories. The distribution of scores was slightly skewed toward higher perceptions of sub-unit readiness, indicating more positive attitudes. Nevertheless, the fact that the majority reported moderate over high readiness is noteworthy, especially when compared to the PCI scales in which the average response was usually in the high category. One explanatory factor could be that as members of reserve sub-units, these soldiers are more aware of their more limited readiness, and of their sub-unit's tiered readiness as

determined by the Army2020 training and deployment cycle. Interestingly, soldiers' perceptions of their individual readiness to fight if necessary was significantly higher (49 percent in both cap badges responded 'High') than perceptions of sub-unit readiness. Almost 70 percent of respondents said that their sub-unit's togetherness was in the high categories, while 61 percent said that the same of their sub-unit's skills in its main military role. Taken together, these statistics provide positive indications of aspects of readiness that complement the affective and instrumental results of the PCI.

A similar number of respondents (66 percent) also stated that their sub-unit's morale was in the high categories. This is another important baseline statistic, and coupled with the fact that only three percent rated their sub-unit morale as 'Low' and none as 'Very Low' indicates high levels of sub-unit morale across the sample. This is especially positive given the organisational changes many of the sub-units have experienced as a result of FR20. High levels of personal morale were also recorded (71 in high categories), in stark contrast to recent data on morale in the regular army.<sup>730</sup> However, of note was a 17 percent difference between the cap badges in the 'High' category. This was subsequently identified by the chain of command as potentially warranting further investigation.

Supporting the PCI scale scores, generally high levels of confidence in sub-unit readiness across a number of other variables were recorded. This included high levels of confidence in the sub-unit's major equipment systems (56 percent), although of note is that on average 35 percent said their confidence in this regard was 'Moderate'. In terms of individuals' confidence in their ability to do their job on operations given the correct pre-deployment training, 87 percent reported 'High' or 'Very High' levels of

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<sup>730</sup> Ministry of Defence (2016) *Armed Forces Continuous Attitudes Survey 2016*, available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/523875/AFCAS\\_2016\\_Main\\_Report.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/523875/AFCAS_2016_Main_Report.pdf), retrieved 21 September 2016.

confidence. 83 percent reported similar levels of confidence in the ability of their sub-unit to perform on operations given sufficient pre-deployment training.

These high levels of confidence are particularly important given the introduction of the tiered and cyclical force readiness structure for the reserves under FR20, and the results indicate that logistics reservists are confident that the new system will provide the requisite training for them, and their sub-unit, to deliver to the required standard on operations. This is a positive indicator, and it appears to be an interesting wider endorsement of the broader FR20 tiered readiness plan for the reserves. The slightly lower levels of confidence in the sub-unit's ability to do job on operations compared to individuals' ability complements the other results on readiness and morale discussed below, where individual scores are usually higher than at the sub-unit level. This is supported by previous research and is likely reflective of the greater number of factors that impact at this level, including personalities, degree of training of other members, unit leadership etc.

### **Experiences of FR20 and Working with the Regulars**

The next section examines individual responses to the five items concerning experiences of FR20 to date, and the 12 items addressing experiences of working with the regulars. Overall, the results showed lower levels of agreement than with the cohesion, readiness and morale items. There were generally higher levels in the 'Can't Say' category, and higher percentages disagreed. While the 'Agree' category generally remained the second most popular choice amongst the sample, indicating that perceptions of the impact of the transformation are relatively positive, the fact that the 'Strongly Agree' percentages were relatively low indicate there is probably more to be desired from the reforms at this time. REME scores were also generally lower than RLC.

Perhaps the most important baseline statistic concerning the impact of FR20 to date is recorded in the item concerning respondents' optimism that the policy will increase their sub-unit's capability. In 2015, responses to this item were skewed toward positive scores, indicating overall optimism that the reforms will prove successful. On average 54 percent said they agreed with the proposition, and 30 percent 'Couldn't Say'. In terms of perceptions of sub-units becoming better at their job as a result of FR20, 43 percent of respondents stated they 'Couldn't Say', while 38 percent were in the agree categories.

In terms of the introduction of better equipment as result of FR20 only 32 percent of both cap badges agreed with the proposition. REME reservists were significantly less positive than their RLC colleagues about the introduction of better equipment as a result of FR20, and this item recorded some of the least positive results in the entire survey, further suggesting that the experience of better equipment into sub-units as a result of FR20 has been mixed. In terms of FR20 delivering better integration with the regulars during training, just over a third agreed this had occurred in their sub-unit. However, there were relatively high levels of mid-point scores, and 24 percent disagreed. Supported by other results above, and the evidence presented in the last chapter, this indicates that opportunities to train with regulars could be increased further.

The items concerning experiences of working with the regulars in the last 12 months had a smaller sample size (n= approx. 210) as a result of the exclusion of soldiers who did not have relevant experience. The first item asked whether working with the regulars had increased soldiers' confidence in their individual skills. 55 percent were in the agree categories. Slightly lower levels of agreement (46 percent) with the regulars' impact on sub-unit competence were recorded, with higher levels in the 'Can't Say' category (44 percent). 65 percent agreed that working with the regulars was a

valuable experience, while on average 68 percent agreed they liked working with the regulars. Both of these items recorded some of the highest levels of agreement in this subset.

### **Background Characteristics as Predictors of Cohesion, Readiness, and Personal Confidence**

First it was necessary to statistically analyse the relationship between background characteristics, cohesion, sub-unit readiness and morale, and personal confidence outcomes. Separate multiple regression analyses, each corresponding to one of these outcomes, were therefore conducted. Factor analysis and scale validity are detailed in Annex A. Results are displayed in Table 3 below.

<b>Table 3.</b> <b>Regression Analyses in which Soldier Background and Sub-Unit Predict Cohesion, Sub-unit Readiness and Morale, and Personal Confidence</b>				
<b>Predictor Variables</b>	<b>Cohesion</b>	<b>Sub-Unit Readiness and Morale</b>	<b>Pers Confidence</b>	
<b>Unstandardised coeff. B</b>				
Male	-1.12	.39	.40	
Age	-.70	.12	.18	
Single	.92	1.26*	.27	
Education	-.62	-.18	-.13*	
Rank	.20	-.23***	.06	
RLC	2.62	.68	.07	
REME (correlation)	-.01	-.02	-.01	
Sub-Unit	-.15*	-.02	.00	
Cohesion		.34***	.15***	
R <sup>2</sup>	.03	.46	.38	
F, df	7, 386	8, 381	8,385	
=	1.93	39.90***	29.10***	

\*p < .05, two tailed; \*\*p < .01, two tailed; \*\*\*p < .001, two tailed.

In terms of cohesion, background characteristics explained only three percent of the variance, indicating that these have only a minor impact on perceptions of cohesion. There was a relatively minor but significant difference between sub-units' perceptions of cohesion (-.15, Sig =.19). This is expected and is significant to the wider population. It also confirms that soldiers' own experiences of their sub-units are more important in shaping their perceptions of cohesion than any other background characteristics,

including education, which has previously been shown to have a highly significant predictive ability with RLC and REME soldier satisfaction.<sup>731</sup> Further supporting previous evidence that better educated soldiers are less satisfied with reserve service, there was a relatively strong association between higher levels of education and lower perceptions of cohesion at relatively significant levels (-.62, Sig = .06).

Following Griffith, in order to determine cohesion's unique contribution, separate multiple regressions were then conducted, first with only background characteristics included and then with scores from the Total Cohesion scale (see Table 4.1) added and regressed onto both the Sub-Unit Readiness and Morale, and Personal Confidence scales. With Total Cohesion excluded from the regression, the most important background characteristic was sub-unit, which had a small but significant (-.07, Sig = .037) association with perceptions of cohesion and readiness.

With Total Cohesion added, the total variance explained (R<sup>2</sup>) by the model jumped from seven percent to 46 percent. This result complements those of previous studies in combat forces, and highlights that reservists' perceptions of sub-unit cohesion is very strongly related to their sub-unit readiness and personal morale. This was also borne out by the relatively strong association at highly significant levels (.34, Sig = .00) between cohesion and readiness and morale. This supports hypothesis 2.

In terms of Personal Confidence, with the Total Cohesion scale added to the regressions, the total variance explained (R<sup>2</sup>) by the model also jumped from 4 percent to 38 percent, further supporting hypothesis 2, and indicating that perceptions of cohesion are also very important in explaining personal confidence. Indeed, cohesion had the strongest and most significant association with personal confidence (.15, Sig = .00). Being better educated was also negatively associated with personal confidence at

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<sup>731</sup> Bury, P. (2016) 'Recruitment and Retention in British Army Logistics Units', *Armed Forces and Society*, available at <http://afs.sagepub.com/content/early/2016/07/21/0095327X16657320.abstract>.

significant levels (-.13, Sig = .05). This is likely due to the fact that better educated soldiers are more critical of their own abilities and the provision of personal equipment. It also supports previous research showing that better educated RLC and REME soldiers are less satisfied with most aspects of reserve service.<sup>732</sup>

Overall, and supporting previous research, this statistical analyses underscores the importance of cohesion in explaining sub-unit readiness and morale, and personal confidence. In terms of background characteristics, when combined with previous research, another important finding is the negative effect that more education has on perceptions of both cohesion and personal confidence. There is clear and growing evidence that targeting this group could lead to better satisfaction, retention, and cohesion across the reserve RLC and REME population.

### **Selected Sub-Unit Perceptions of Cohesion, Readiness and Morale**

The next research question was to examine the difference in perceptions of cohesion between certain sub-units. In order to do this, eight sub-units were selected from those with the highest response rates. Some of these sub-units had experienced considerable organisational change as a result of FR20. These units were then contacted to ascertain their average trained and untrained attendance on drill nights. In consultation with the army, this figure, rather than the total trained and untrained strength, was decided to be a more accurate indicator of the sub-unit population size from which respondents were drawn and the ad hoc reality of reserve attendance. Average attendance ranges from 30-50 percent of actual sub-unit strength. Table 4 below indicates the eight sub-units that were chosen for further analysis, and details the organisational changes certain sub-units are undergoing as a result of FR20. The relatively low numbers of respondents in the sub-units impacted their confidence interval, but this is to be expected for smaller groups.

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<sup>732</sup> Bury, 'Recruitment and Retention in British Army Logistics Units'.

Next, the selected sub-units' responses to the PCI scales and the Total Cohesion scale were examined, as shown in Table 4.1 on page 243. Most of the sub-units displayed high levels of cohesion across all the components, and the average total cohesion score was 80/100. This is a good baseline metric for understanding cohesion in these sub-units, and, given the scale of the organisational change some of these sub-units have undergone, this a positive outcome that may indicate that perceptions of cohesion have not been too adversely affected by FR20. Nevertheless, it is noteworthy that the PCI identified that reservists' satisfaction with time off and time for social

**Table 4.  
Selected Sub-Unit Responses**

Unit - Sub-unit	Responses = 208	Percentage of av attendance	Confidence Interval	Organisational Change
101 REME - 127	26	77.5	9.5	
102 REME - 147	19	79.1	10.5	
150 RLC - 216	19	47.5	16.5	
152 RLC - 220*	47 (2016 = 44)	223^	NA	Re-roled from Transport to Fuel
156 RLC - 236*	21 (2016 = 16)	95.5	4.7	Re-roled from Transport to Supply
157 RLC - 580*	35 (2016 = 31)	89.7	5.4	
165 RLC - 266	22	36.7	16.8	Re-roled from Transport to Port and Maritime
167 RLC - 111	19	57.6	14.9	
17 PM - 51	73	94	5.5	
1 RI - A Coy	50	77	11.66	

\*Sub unit used in 2016 longitudinal comparison, only 2016 n given.

<sup>^</sup>220 Sqn responses far exceeded average attendance and represented 55.3 percent of total strength, with a 9.6 confidence interval.

events, had the lowest of all the component scores.

Interestingly, although only indicative results, neither the regular logistics sub-unit, nor the infantry sub unit had higher total cohesion scores than their reserve counterparts. However, when sub-unit results on the separate bonding scales are

consulted a number of patterns emerge. Firstly, both regular units' low scores on the Organisational Bonding Instrumental, Needs, scale are important as they are significantly lower than the reserve units and have heavily negatively impacted these units' total cohesion score. Clearly, these regular units perceive more strongly that they do not have enough time to spend with families or socialise together, highlighting the increased workload associated with full-time service. Such a finding also shows the utility of the PCI in identifying issues in sub-units. Secondly, and supporting hypothesis 3, both regular sub-units reported lower perceptions of Horizontal and Vertical Affective Bonding, and higher perceptions of the Horizontal and Vertical Instrumental, and Anomie scales than the mean scores for the reserve logistics sub-units. While this would initially appear to indicate that there are lower bonds between regular soldiers and their leaders, in fact when taken in tandem with the regulars' higher instrumental component scores, this actually may suggest the greater importance of task cohesion and an awareness of the discipline system in the regulars. This supports the analysis in the next chapter.

In order to examine Sub-Unit Readiness and Morale and Personal Confidence at the sub-unit level, firstly the mean and standard deviations for the eight selected sub-units in 2015 were calculated and are presented in Table 5 below. Of note are the relatively high levels of sub-unit readiness and morale recorded amongst the selected sub-units, supporting the evidence presented above. The average score per item on the scale was 4, a very similar score to those recorded on the PCI. Personal confidence scores were comparatively lower than those on the sub-unit readiness and morale scale. As expected given its low cohesion score, and ongoing re-roling, 266 Sqn 165 RLC recorded the lowest readiness and morale score. It also recorded the second lowest personal confidence score, supporting the utility of the PCI as a useful method of assessing these issues.

**Table 4.0**  
**Sub-Unit Cohesion Scores on Cohesion Scales with 2016 Longitudinal Scores on \*Selected Sub-Units**

Unit	101-127	102-147	150-216	152-220* (2016 score)	156-236* (2016)	157-580* (2016)	165-266	167-112	Av. Mean (10)	51 Sqn - 17 PM	1 RI - A Coy
Coh Scales	PCI scales Mean/Std Dev										
HB-A	8.19/.94	8.26/1.59	7.89/1.23	8.35/1.18 8.42/1.01	8.43/1.03 8.29/1.16	8.50/1.02 8.13/1.59	6.95/1.81	7.79/1.27	8.04	6.74/2.02	7.5/1.43
HB-A,L	8.19/.80	8.21/1.81	8.11/1.37	8.28/1.03 8.45/1.23	7.79/1.38 7.47/2.07	8.23/1.20 7.73/1.76	7.14/1.62	7.52/1.71	7.93	7.27/1.56	7.76/1.42
HB-I	8.69/1.09	8.74/1.28	8.11/1.37	8.68/1.07 8.48/.98	8.65/1.14 8.47/1.23	8.85/1.05 8.16/1.32	7.14/2.15	8.42/1.26	8.41	7.69/1.67	8.14/1.01
VB-A	8.31/.88	8.33/1.75	8.28/1.07	8.49/.91 8.32/1.22	7.95/1.09 8.13/1.41	8.50/1.13 8.27/1.36	7.18/1.50	7.89/1.52	8.12	7.25/1.61	7.56/1.43
VB-I	8.54/.81	8.11/1.71	7.95/1.13	8.37/.97 8.36/1.28	7.95/1.15 8.18/1.74	8.09/1.07 8.06/1.73	7.09/1.51	8.16/1.26	8.03	7.40/1.44	8.32/1.05
OB-A, V	8.19/.69	8.21/1.23	8.37/1.16	8.37/.90 8.43/1.04	8.10/.89 7.88/1.73	8.41/1.33 7.84/1.63	7.59/.85	8.00/1.41	8.15	7.19/1.80	7.71/1.17
OB-A,P	8.38/.98	8.32/1.16	8.53/1.02	8.66/.87 8.44/1.01	8.15/1.04 8.06/1.52	8.50/1.02 8.34/1.10	6.41/1.65	8.53/1.43	8.19	7.21/1.56	8.64/.94
OB-I,A	8.08/.98	8.39/1.38	8.26/.65	8.30/.93 8.42/1.16	7.95/.91 8.18/1.07	8.26/1.44 7.71/1.40	6.77/1.69	8.42/1.07	8.05	7.75/1.49	8.28/.93
OB-I,N	7.96/1.25	7.58/1.35	7.78/1.30	7.60/1.06 8.05/1.07	6.90/1.24 7.88/1.45	8.06/1.13 7.29/1.51	6.41/1.53	7.73/1.56	7.50	6.17/1.64	5.48/1.71
OB-I,G	8.08/1.02	8.10/1.45	8.11/.96	8.30/1.02 8.42/1.14	7.90/1.37 7.53/1.77	8.09/.92 8.10/1.25	6.50/1.63	8.42/1.30	7.94	6.60/2.0	6.9/1.74
<b>TCoh (100)</b>	<b>82.62 /6.42</b>	<b>81.94 /12.37</b>	<b>81.94 /8.53</b>	<b>83.51 /7.28</b> <b>83.81 /8.97</b>	<b>79.56 /8.22</b> <b>79.93 /12.56</b>	<b>83.94 /7.20</b> <b>79.75 /11.04</b>	<b>69.09 /11.06</b>	<b>80.90 /11.48</b>	<b>80.44</b>	<b>71.55 /12.43</b>	<b>76.26 /9.14</b>

**Table 5. Selected Sub-Unit Responses to Readiness and Morale and Personal Confidence**

Unit - Sub-unit (N)	Sub-Unit Readiness and Morale /40	Personal Confidence /20		
<b>Mean / Std Deviation - 2016</b>				
101 REME – 127 (26)	28.80 / 3.16	16.81 / 1.83		
102 REME – 147 (19)	28.89 / 4.52	16.06 / 2.16		
150 RLC – 216 (19)	26.79 / 5.59	16.72 / 2.02		
152 RLC – 220* (47)	29.20 / 4.47	29.88 / 5.21	16.87 / 1.97	16.26/1.90
156 RLC – 236* (21)	28.70 / 4.53	27.81 / 5.52	16.53 / 2.27	16.29/2.66
157 RLC – 580* (35)	29.59 / 4.58	28.93 / 3.44	16.46 / 1.84	16.86/2.03
165 RLC – 266 (22)	23.68 / 5.18	16.40 / 2.20		
167 RLC – 111 (19)	28.42 / 4.61	17.26 / 1.69		
<b>Average Mean 2015-2016</b>	28.00	28.87	16.64	16.47
17 PM – 51 (73)	25.16 / 5.92	14.54 / 3.04		
1RI – A (50)	31.10 / 3.58	16.96 / 1.70		

Interestingly, and again only indicative given the small sample size, results for the regular infantry sub-unit indicated much higher perceptions of sub-unit readiness and morale, and personal confidence than either its regular logistics counterpart, or those in the reserves. While this result needs to be corroborated by further data, one possible explanatory factor is this infantry unit's higher readiness demands, and/or the greater awareness of readiness and morale as a result of the increased collective training burden associated with infantry units as discussed in the next chapter. 17 Port and Maritime Regiment's low scores, especially in personal confidence, was identified as possibly warranting investigation by the chain of command.

### **Sub-Unit Level Perceptions of Working with Regulars and the Impact of FR20**

In order to gain an understanding of the relationship between the 12 items concerning respondents' experiences of the FR20 reforms and working with the regulars, it was necessary to conduct another EFA, as detailed in Annex A. Once the factors had been

identified and scales confirmed, to examine the relationship between background characteristics and the Working with Regulars and Impact of FR20 scales, separate multiple regression analyses, each corresponding to one of these outcomes, were conducted. Predictor variables were soldier background characteristics and sub-unit. In terms of experiences of working with the regulars, overall there were no major differences between RLC and REME cap badges, and sub-units. Single soldiers were strongly associated with better experiences of working with the regulars at moderate levels of significance to the wider population ( $1.57$ ,  $\text{Sig} = .05$ ). This is similar to other scale scores indicating single soldiers' higher perceptions of morale and readiness and could conceivably be due to higher levels of motivations and fewer conflicts between reserve service and family life.

In terms of soldiers' experiences of the impact of FR20 to date, higher ranks were associated at high levels of significance with lower scores on this scale ( $-.15$ ,  $\text{Sig} = .036$ ). This is to be expected as higher ranks will have more military experience and arguably a wider organisational context within which to compare the current reforms. Next, to illustrate how the selected sub-units scored on the Working with Regulars and Impact of FR20 scales, the means and standard deviations were calculated. These are presented in Table 6 below.

The average sub-unit score on Working with Regulars was 25.5 out of a possible 35, with the response per item score (3.6) indicating that the average answer

<b>Table 6.</b> <b>Selected Sub-Unit Responses to Experiences of Working with Regulars and Impact of FR20</b>		
<b>Unit - Sub-unit (N)</b>	<b>Working with Regulars</b>	<b>Impact of FR20</b>
<b>Mean / Std Deviation – 2016</b>		
101 REME – 127 (26)	26.77 / 4.42	17.40 / 2.45

102 REME – 147 (19)	22.92 / 6.57	17.16 / 3.62		
150 RLC – 216 (19)	23.17 / 4.82	15.82 / 2.86		
152 RLC – 220* (47)	25.76 / 5.03	25.28/ 4.50	17.13 / 3.12	17.50/ 3.63
156 RLC – 236* (21)	23.30 / 3.95	26.57/ 5.62	16.58 / 3.39	14.73/ 4.95
157 RLC – 580* (35)	25.78 / 4.24	26.71/ 5.14	17.24 / 3.03	16.55/ 2.75
165 RLC – 266 (22)	28.63 / 2.20		15.55 / 2.52	
167 RLC – 111 (19)	27.28 / 4.68		16.47 / 2.67	
<b>Average Mean</b>	25.45	26.19	16.67	16.26

was slightly weighted toward ‘Agree’. This indicates that most sub-units thought that working with the regulars was a positive experience, and clearly some sub-units had better experiences than others, as detailed above. Of particular note is that although (or perhaps in spite of the fact that) 266 Sqn 165 RLC recorded lower levels of cohesion, readiness and morale, and personal confidence, it recorded the highest score on this scale. This is very interesting as it suggests that positive experiences of the regulars are not necessarily influenced by perceptions of cohesion, readiness and morale, and personal confidence. In short, these experiences may be viewed as a separate factor, removed from sub-unit climate, by sub-unit members. Meanwhile, there were generally lower levels of agreement that FR20 was having positive impacts on the selected sub-units. The average sub-unit score on Impact of FR20 was 16.7 out of 25, with the response per item score (3.3) indicating that the average answer was weighted toward ‘Can’t Say’. Crucially, this indicates that respondents in the selected sub-units remained very much undecided about the real impact of FR20 on their sub-units in 2015.

### **Perceptions of Cohesion, Readiness and Morale, and FR20 over time**

A major research interest was to ascertain if sub-unit perceptions of cohesion, readiness and morale, and experiences FR20, were changing as FR20 progressed. In terms of the three sub-units selected for longitudinal comparison between 2015-2016, it is noteworthy that the mean total cohesion scores remained relatively stable, but that in

one sub-unit this had dropped by about 4 percent. A Paired Samples T Test revealed that the difference in cohesion scores over time amongst these three reserve sub-units was just at the limits of statistical significance ( $\text{sig}=.41$ ,  $t=.72$ ,  $df=73$ ). This indicates that cohesion scores have changed by a small but significant amount in both directions and supports the qualitative data presented in Chapter Six on the mixed impact of FR20 to date.

In terms of these three sub-unit scores on the Sub-Unit Readiness and Morale, and Personal Confidence scales there were no significant changes in the mean in either ( $\text{Sig}=.65$ ,  $t=.48$ ,  $df=77$ ;  $\text{Sig}=.81$ ,  $t=.24$ ,  $df=82$ , respectively). This further supports the qualitative data in Chapter Six, and the quantitative cohesion data above, that there has been little significant change as a result of FR20 over 2015-16. Although these results are indicative only, they do suggest that FR20 is failing to increase cohesion and readiness and morale in a significant manner, contrary to hypothesis 1.

Conversely, a paired T Test with the 2016 data for the three selected sub-units indicated significant positive increases in the mean scores (8.79 at a 95% confidence level,  $\text{Sig}=.00$ ,  $t=11.25$ ,  $df=40$ ) in these units' attitudes to working with the regulars since 2015. This likely reflects more exposure to the regulars, and positive experiences during this increased exposure. As such, this data supports some of the qualitative data presented in the last chapter that FR20 is increasing reservists' exposure to the regulars. Conversely, there was a decrease in confidence that FR20 would deliver increased sub-unit capability over the same time period, at similar levels of significance (-9.81 mean,  $\text{Sig}=.00$ ,  $t=-8.22$ ,  $df=32$ ). Importantly, this contradicts the data presented for the wider sample in Chapter Six, and indicates that in the three sub-units examined longitudinally, confidence in FR20 has declined since 2015. When combined with the lack of significant data concerning growth in cohesion, readiness and morale, this supports my

argument that FR20 is struggling to increase logistics sub-unit capabilities, but as discussed in the next chapter, is making progress with integration with the regulars.

## **Conclusion**

This chapter set out to examine reservist logisticians' perceptions of cohesion, readiness and morale, and experiences of FR20 in a representative sample of RLC and REME reserve sub-units. It then conducted advanced statistical analysis to determine the relationship between cohesion, readiness and morale, and attitudes to FR20 amongst reservists. Finally, it examined three of these sub-units' responses longitudinally to get an initial indication of the impact FR20 was having on these perceptions.

The chapter has shown that perceptions of sub-unit cohesion, measured at both the individual and sub-unit levels, were relatively high amongst RLC and REME reservists in 2015. This is a positive outcome that highlights that, in 2015, the FR20 transformation and the organisational frictions these created appeared to have not too adversely affected cohesion levels within this population. Complimenting previous research, higher education levels were found to have a significant negative impact on perceptions of cohesion and readiness. At the individual level of analysis, an examination of the components of cohesion revealed that the highest scores were recorded in lower ranks' perceptions of team work. This finding was supported by high scores in scales measuring lower ranks' pride in their sub-unit, and their positive contribution to sub-unit missions. Clearly, the fact that two of these three high-scoring scales measure instrumental or task-oriented cohesion, rather than affective cohesion, is interesting as it suggests that working together to complete tasks (and hence fulfil operational requirements) is where these reservists perceive their sub-units are most cohesive. More broadly, when indicatively compared with regular sub-units it is clear that perceptions of social cohesion are higher in reserve sub-units than in regular units,

while those of task cohesion are lower. Again, this research is not conclusive given the smaller regular sample size and further research is needed to prove hypothesis 3, but the initial evidence does support the qualitative data presented in the next chapter that social cohesion is more important in reserve service.

In terms of RLC and REME reserve sub-unit readiness, in 2015 the majority rated it moderate, but two thirds rated their sub-unit's morale as high. Only a small percentage rated their morale as low. Supporting previous research and hypothesis 2, levels of cohesion amongst REME/RLC reservists explained the most variance in perceptions of sub-unit readiness and morale, and personal confidence. This underscores the importance of cohesion in delivering military capability, not only in regular forces as detailed in previous research, but also in reserve logistics sub-units.

In terms of the impact of FR20 to date, in 2015 just over half the sample agreed that FR20 would increase their sub-unit's capability. Generally, when compared to scores on other scales, there were less positive perceptions about the impact of FR20, especially concerning the provision of better equipment to sub-units. In 2015, most respondents were undecided about the actual impact of FR20 on their sub-unit. Nevertheless, high levels of agreement with both individual and sub-unit ability to perform on operations given sufficient pre-deployment training were recorded.

In 2016 however, the three sub-units selected for longitudinal comparison registered significantly lower levels of confidence in FR20 increasing their sub-units' capability, potentially indicating that the policy is struggling to have a major positive impact. Conversely, by 2016 the indications were that FR20 had significantly increased reservists' exposure to the regulars. There was only a minor change in cohesion, and no significant changes to perceptions of readiness and morale, nor personal confidence in the three sub-units, thereby raising questions as to the impact of FR20.

Although some of the data presented here is only indicative, overall the quantitative data appears to support the argument that FR20 is failing to deliver hard capability, but is delivering better exposure to the regulars for these reservists. It does appear to be increasing integration, and hence cultural affinity with, the regulars. But the picture is mixed. FR20 has failed to have a significant impact on cohesion, readiness and morale, and personal confidence in some of these sub-units to date. Supporting the findings of the last chapter, this especially concerned the provision of better equipment. Meanwhile, sub-units' confidence in their ability to deliver the capability required by FR20 appears to have dropped over time.

Finally, the ability of the PCI to identify potential issues within these sub-units is important. As the PCI is a short and easy survey to disseminate and collate, it may help contribute to better leadership, more cohesive units, confirmation that army values are being imbued, and the identification of potential problems in a fast, transparent and anonymous manner.

## Chapter Eight

### FR20 and Cohesion

In *The Combat Soldier* – the most in-depth examination of professionalism’s impact on combat forces to date – King argues that the intensive collective training associated with professionalisation has gone beyond the mere transformation of Western forces’ effectiveness to fundamentally alter the nature of social relations between their soldiers.<sup>733</sup> Drawing on Max Weber’s concept of status honour in uniting groups, and the threat posed to these groups by the heightened individualism of Emile Durkheim’s anomie, King shows how both of these have imbued military practice with a moral force – a professional ethos – that unites military groups.<sup>734</sup> Thus, expanding on Huntington’s identification of the importance of ‘corporateness’ amongst the professional officer class – in essence their shared commitment and sense of community – King argues that the enhanced emphasis on training and collective action in the professional infantry instils a common obligation to perform effectively, not just amongst officers, but combat soldiers as well. For King, ‘professional comradeship’ based on effective performance has replaced the classical sociological understanding of cohesion based on interpersonal bonds.<sup>735</sup> Professionalism has superseded love as the source of main source of cohesion in the infantry.

Although a later study by King and I examined how ‘cold professionalism’ influences, and is influenced by, the heightened social and emotional bonds of

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<sup>733</sup> King, *The Combat Soldier*, 339.

<sup>734</sup> Ibid, 341.

<sup>735</sup> King, *The Combat Soldier*, 350.

combat,<sup>736</sup> thereby partly reconciling the classical cohesion literature with that on professional militaries, the recent cohesion literature has focused exclusively on the battlefield performance of combat forces. In fact, with a few notable exceptions, the majority of the cohesion literature to date has focused on infantry soldiers.<sup>737</sup> This leaves open the question as to whether the nature of cohesion in logistics units is the same as in the infantry. Moreover, to date, the focus has been on professional regular forces, leaving further uncertainty about how reserve forces – with less time to train intensively and therefore, theoretically at least, lower skill levels – generate and sustain their cohesion. Indeed, neither the wider reserve literature, nor that on the British reserves in particular, has conducted a detailed examination of reserve cohesion, nor the impact of professionalism upon it.

Both Kier and Farrell have discussed the importance of normative, cultural aspects in explaining military transformations, but neither sought to investigate how culture and cultural emulation manifest themselves at the micro-level. Both approaches were also top-down and concerned regular combat forces. In this chapter, I discuss the distinctive nature of reserve logistics units in order to examine the FR20 transformation from the bottom-up. Firstly, I compare the nature of cohesion in logistics forces to the infantry, using field observations of the selected sub-units as an evidential base. Upon clarifying this issue, the central question of FR20's impact on cohesion and professionalism within reserve logistics sub-units is discussed from a qualitative perspective. The subjects include the persistence of social cohesion; the demise of the 'drinking club'; the rise of professionalism; and the unique nature of reserve discipline. I suggest that, following Chapter Six, although many of these sub-units are unlikely to

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<sup>736</sup> Bury, P. and King, A. (2015) 'A Profession of Love? Cohesion in a British Platoon in Afghanistan' in King, A. (ed) *Frontline: Combat and Cohesion in the Twenty-First Century*, Oxford: Oxford University Press, 213.

<sup>737</sup> Zurcher, L. (1965) 'The Sailor Aboard Ship: A study of Role Behaviour in a Total Institution', *Social Forces*, 43(3).

deliver the full capability required of FR20 on schedule, in many areas the transformation is slowly but profoundly changing the culture of, and social relations in, the Army Reserve.

### **Logistics and Reserve Cohesion**

In order to assess the impact of FR20 on these sub-units' cohesion, first it is necessary to briefly examine the nature of logistics and reserve cohesion in general. King's work on the importance of intensive, repetitive, standardised training in explaining cohesion is also supported by those of Ben-Ari et al, and Strachan. For these authors, cohesion relies not on interpersonal social bonds between soldiers, but on the effective performance of the military group. Both Ben-Ari and King examine infantry platoon training in great detail, arguing that standardised words of command and individual battle drills, coordinated at the collective level, are central to explanations of successful combat performance. Indeed, King's work on infantry combat techniques illustrates the importance of minute, almost esoteric, movements such as the position of the thumb when firing, and the need to 'bob' around corners to reduce angles in urban combat.<sup>738</sup> For him, such techniques are indicative of the resources, knowledge and time devoted to training in the professional infantry. Such minutiae are important because, when implemented correctly at the individual level, and crucially, co-ordinated at the collective level, they reduce the risk of fatalities. One of King's observations is therefore that the threat of death in combat as a result of the failure to execute drills correctly provides another powerful explanatory factor in explaining successful collective infantry performance.

Most logisticians, however, are not trained to the same standard in infantry techniques. Despite the need for increased infantry skills when operating in non-linear

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<sup>738</sup> King, *The Combat Soldier*, 320.

battlespaces where insurgents threaten supply convoys, most logistics soldiers' primary role lies elsewhere. Unlike in the infantry, where different units share the same standardised skills and training techniques, in logistics units the skills required of personnel are as varied as the logistics functions themselves. In the British Army these functions are myriad. Logistics units are responsible for transport and movement; port and maritime operations; explosive ordnance disposal (EOD); air dispatch; catering; cleaning; and post duties, amongst others. Meanwhile, REME craftsmen specialise in the repair and maintenance of numerous vehicles and airframes. There is therefore a vast difference in the skill set required of logistics soldiers, not just compared with the infantry, but also between their respective trades. Moreover, there is a difference between logistics trades requiring high levels of co-ordinated collective action – such as port and maritime and air freight – and others that are perhaps more reliant on individual skills, such as EOD, REME, transport and catering. This distinction is important in understanding the nature of cohesion in logistics units.

As its name suggests, 165 Port and Maritime Squadron RLC is specialised in two trades, the former being the loading and unloading of cargo in ports and beachheads, the latter referring to the delivery of cargo and vehicles on seaborne rafts. The port trade requires substantial skills to operate a wide variety of heavy plant, including forklifts, trucks, bulldozers, and mobile and specialised 40-ton cranes. Often, the driver of the vehicle is assisted by a senior rank who directs operations through standardised hand signals and words of command, highlighting that King's arguments on the importance of these in explaining infantry performance are applicable to certain logistics trades.<sup>739</sup> Such action also requires detailed practical knowledge of how to load and secure all types of cargo for movement by road or sea. While the maritime trade is

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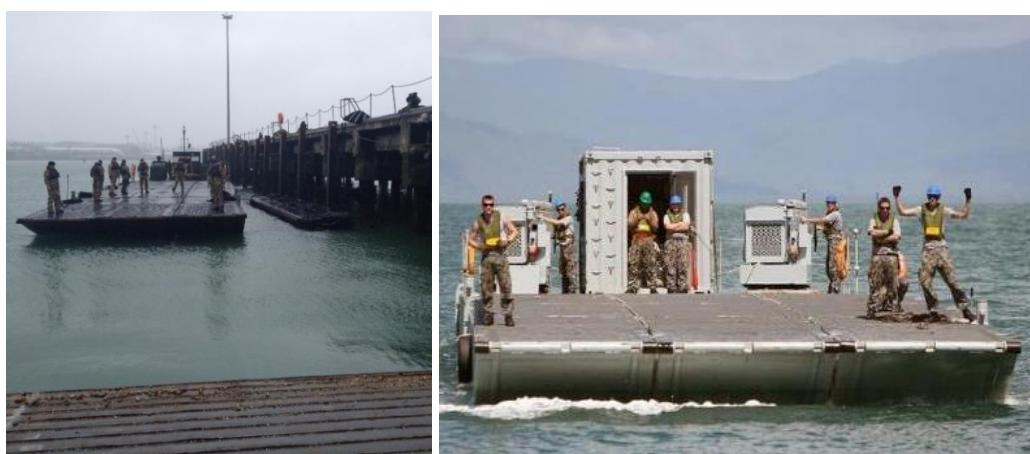
<sup>739</sup> King, 'The Word of Command'

also concerned with the transportation of cargoes, their main operating platform is the Mexeflote raft, which can carry over 220 tons. The skills involved to operate this are varied. Highly trained engineers (usually a sergeant or corporal) are responsible for piloting the raft and repairing its engines, whilst another NCO is responsible for the overall safe loading of the Mexeflote and pilot instructions to the engineer. Junior ranks are responsible for securing the cargo correctly using numerous different lashings, and the safe landing of the Mexeflote as it moors or beaches. Thus, individually and collectively, the skills required in this logistics unit are vastly different to those expected of the infantry.

**Figure 4.** 165 Port and Maritime Squadron conducting training on various Port trade equipment.



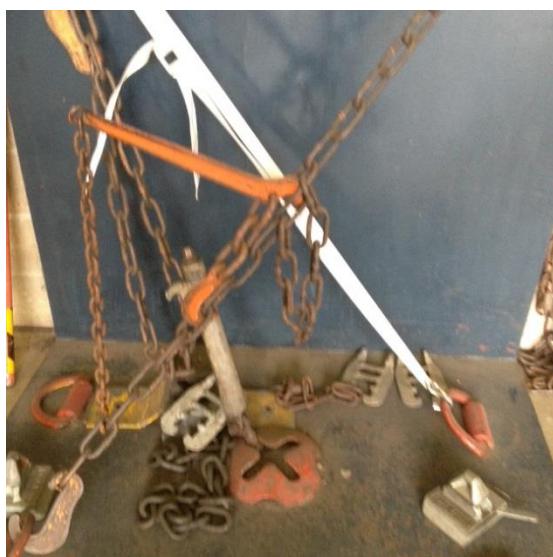
**Figure 5.** Mariners practise another landing with the Mexeflote raft.



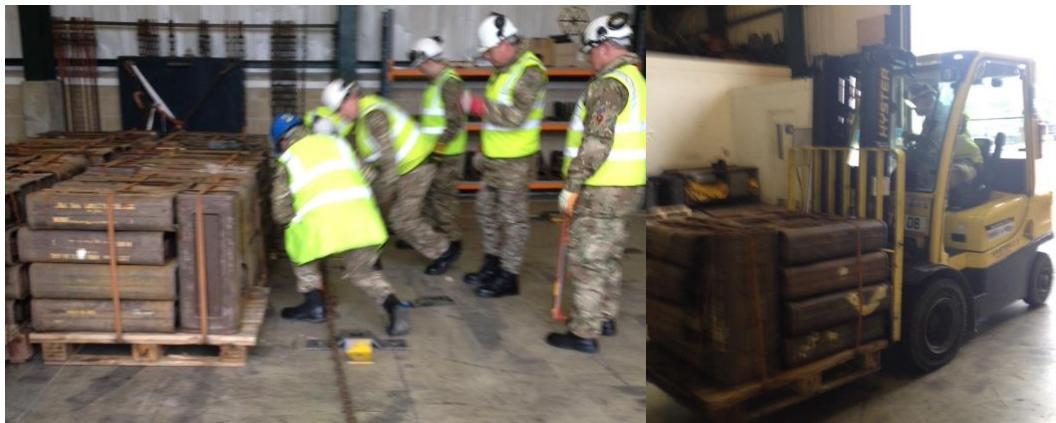
However, for each soldier to be qualified at the requisite level as a port or maritime ‘operator’, the level of individual expertise in their relevant field is similar to that of the same rank in the infantry. Sergeants and corporals are qualified to operate numerous heavy plant machines, acquiring highly detailed knowledge about their capabilities and safe operating requirements. Like the infantry, these individual skills are learnt through in-unit training, on qualifying courses and through wider experience. The level of skill and responsibility for junior ‘port ops’ who, as a private or lance corporal drive a 12-ton bulldozer, are in some respects greater than the equivalent rank in the infantry. In the maritime trade, apart from the highly skilled engineers who must be proficient at piloting the Mexeflote in a variety of sea states and environments, the crew must have a detailed knowledge of the raft’s capabilities, the cargo plan, and hand signals. Lower ranks must also be versed in the quick and safe securing of cargo to the vessel.

In both trades, the ability of individuals to operate quickly but safely is viewed as indicating the mastery of the required skills. Indeed, their sub-units’ effectiveness is

**Figure 6.** A lashing and secure points training aid for a Port operator ‘gang.’



**Figure 7.** A gang practise securing a pallet of ammunition for a forklift driver.



often judged by the speed in which they can safely unload and load cargoes.<sup>740</sup> Interestingly, slow unloads or accidents are perceived as indicating a lack professionalism, not only by those in the sub-units themselves, but also by other units.<sup>741</sup> While the level of danger these soldiers operate in is usually much less intense than the infantry, and hence the stakes and operational pressure on personnel are usually lower, the importance of the tempo of operations and avoiding casualties to logisticians' professional status shares some similarities with the infantry.

Moreover, in the case of 165 Squadron, effectiveness and hence professionalism is achieved by repeated drills and training to improve both the individual and collective speed with which port 'gangs' and Mexeflote crew can complete their task. For example, securing different cargoes with different lashings is repeatedly practiced, with each gang member responsible for different duties and areas. The pace at which this team collectively works affects the forklift driver who is waiting to move the load once it has been secured to pallets. Similarly, it is not unusual for Mexeflote crews to spend days conducting numerous landings at piers and beaches during training. As with the port gangs, these require the competent performance of individual drills taught by repetition, such as mooring techniques and standardised words of command and hand

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<sup>740</sup> Fieldwork, 16 January 2016.

<sup>741</sup> Ibid.

signals, supporting King's observations about the importance of the latter in explaining elite infantry performance.<sup>742</sup> These in turn contribute to the rapid and safe collective performance of the Mexeflote crew. While there is admittedly not the same degree of choreographed group action, in a similar way to the infantry's repetition of section attacks or close quarter battle techniques, logistics trades requiring collective action train repeatedly to be effective. In the case of the port and maritime trade – and any others requiring collective action – the safe execution of individual actions provide the foundation for effective collective performance. Indeed, it appears that Strachan's and King's observations on the source of effective performance in the infantry also explain effective performance in many logistics units. Despite the different collective action problems presented in logistics trades, the solutions to them are remarkably similar to those in the infantry. Perhaps unsurprisingly, successful collective logistics performance shares the same fundamental characteristics as in the infantry.

However, the sources of cohesion in individual-focused logistics trades may be different. These trades, such as transport, EOD and the REME, are much more reliant on individual skills than collective drills for effective performance. Their emphasis on individual action raises the question as to whether the recent literature accurately describes the nature of cohesion amongst these trades. Without the need for coordinated group action, the dense obligational bonds caused by training that King and others observed in the infantry may not be as important to understanding their cohesion. Indeed, numerous reservist and regular soldiers identified the difference between the individual nature of their trades and the infantry. While some noted how the RLC had a less hierarchical rank structure, others the 'more robust' culture in the infantry

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<sup>742</sup> King, 'The Word of Command'.

compared to the RLC,<sup>743</sup> the most telling observation was made by two transport officers who elucidated on their sub-unit's experience:

- R1: 'Because it's more of a singleton trade, maybe they don't get the teamwork and the team spirit?'
- R2: 'I think... [individual] training is almost damaging because of the fact it is a singleton trade it is quite common that we deploy one person or two on a tasking, whereas I'd much prefer to deploy a section, because that enhances cohesion. But of course, it's not necessarily the workload requirement for a section to become operationally effective.'<sup>744</sup>

These observations are especially interesting as they appear to indicate a view that individual traded units suffer from a lack of cohesion. In fact, these officers suggest that cohesion is a group attribute distinct from operational effectiveness. In sub-units where taskings are performed by individuals, successful performance is viewed as distinct from cohesion. Importantly, this cohesion is defined in social terms. Of course, by their very nature, both the classical and revisionist cohesion literature are primarily concerned with group activity. But this distinction between cohesion in collective and individual logistics trades in the professional era must be made in order to understand the wider impact of FR20 in these sub-units. The fact that cohesion is not necessarily a prerequisite for successful performance in individual trades adds nuance to King's definition of cohesion in professional militaries as equating successful performance. In logistics units, individuals can perform military tasks successfully without group membership. Successful group performance does not always explain effective military performance.

The fact that some trades are individual by nature and others require collective action has major implications for how reserves logistics soldiers generate and maintain their cohesion. For King, the cohesive bonds in the professional infantry are formed by intensive training and commitment to their profession.<sup>745</sup> Following Leon Festinger, he

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<sup>743</sup> Interviews 5, 6.

<sup>744</sup> Interview 3.

<sup>745</sup> King, *The Combat Soldier*, 374.

also notes that the density of interactions amongst infantry soldiers is important; propinquity matters.<sup>746</sup> However, intensive training requires large amounts of time unavailable to part-time regulars. With less time to train and often shorter qualifying courses, there is also a skills deficit between most regulars and reservists. Meanwhile, the part-time nature of reserve service suggests that the density of interactions in sub-units with both individual and collective action trades is also less than the regulars. Thus, in reserve logistics groups requiring collective action, social cohesion may still be very important. It would be expected to be even more so in individual trades. However, FR20, by its very nature, is attempting to professionalise the reserves through increased training in order to better integrate them with the regulars and prepare them for routine use on operations. This creates an interesting problem in terms of the cohesion literature. On the one hand, today's reserve logistics units may be more reliant on social bonds than the regular professional infantry. On the other, the professionalisation of the reserves could be changing the nature of social relations in these units and hence the sources of cohesion within.

One final discussion is needed here on the impact of post-Fordist approach to logistics on the skills and cohesion of the logistics units examined. Although I have detailed that the term post-Fordism mainly refers to strategic and operational management processes and structural issues, there was some evidence that post-Fordist innovations will eventually have an impact on logistics skills at the tactical level. As discussed in Chapter Five, the most obvious example is that the nature of modern conflict and the adoption of the nodal FOB system reliant on CLPs has forced logisticians to hone their combat skills to a higher degree than in the past, resulting in a greater emphasis on military skills in logisticians' pre-deployment training programmes. Another example concerns the MJDI system. While it still has some teething issues to

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<sup>746</sup> Ibid, 351.

be resolved, when fully introduced and integrated with TAV-, soldiers reported that it should significantly quicken vessel unloading by alleviating the need to manually stock-check and process items before onward transportation.<sup>747</sup> The introduction of MJDI was also acknowledged to begin a radical change in the structure of RLC support to combat units and hence changes in the career structures and training of RLC soldiers, who will now have fewer postings to combat units.<sup>748</sup> However, the need to attend MJDI specialist courses in order to operate the system has itself provided other opportunities in this regard, highlighting the ongoing specialisation within the ‘core’ logistics component. Outside of MJDI and other IT enabled software systems, and the impact of centralisation and outsourcing on training discussed in Chapter Six, there was little evidence that post-Fordist logistics was changing skills at the tactical level in the units examined. Nevertheless, this will likely change as new technologies emerge to support the distributed logistics model; for example a road transport unit could conceivably be re-roled to operate delivery balloons in response the full automation of road vehicles. While such changes could force the source of certain units’ cohesion to change, with more emphasis on individual rather than collective skills, overall the nature of cohesion in logistics units is unlikely in the short-medium term to differ from the individual/collective paradigm outlined above. Nevertheless, automation and robots may also ultimately render many logistics skills, and hence units, redundant, depending on task complexity and threat environment.

### **The Persistence of Social Cohesion**

While Leonard Wong, and Bury and King, have shown how interpersonal bonds still contribute to effective performance in the professional infantry, there has been no

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<sup>747</sup> Interview 23.

<sup>748</sup> Interview 23.

detailed examination of cohesion in the reserves since professionalisation.<sup>749</sup> In his 1990 study, Walker briefly discussed cohesion in the TA, highlighting the importance of ‘drill hall club’ social cohesion. For Walker, this referred to the beers usually enjoyed in messes by reservists after weekday training at their sub-unit location, and he opined that the ‘activities at the drill hall club are perhaps as important as the evening training itself.’ Crucially, he noted that the social cohesion built ‘the regimental esprit and unit identification critical for sustaining not only combat units, but also volunteer reserve units in which cohesion is a precursor for encouraging men to turn out for training.’<sup>750</sup> He also observed the importance of social events for generating cohesion and how reservists ‘social life begins to revolve around the unit’.<sup>751</sup> For Walker, interpersonal bonds remained central to understanding TA cohesion in the late 1980s. Of course, when Walker was writing, only social cohesion had been identified. As a result, the question remains if, as the Army Reserve professionalises, social cohesion remains as important as it did in the past.

In order to assess the impact of FR20 on cohesion, first the nature of cohesion in the selected sub-units must first be considered. One occasion observed during the fieldwork was particularly instructive. As I arrived at a newly-formed REME unit on a weekend, they were preparing ‘a social’; a Hawaiian-themed party for that evening. Already the chef had improvised a large barbecue from an old barrel outside the kitchen, while other soldiers were busy setting up a limbo bar for games. A paddling pool with water toys was set up nearby. It was clear this was an attempt for new colleagues to have fun and socialise together. When I was introduced to the officer in charge, I commented on the effort that had gone into the evening. He responded: ‘We

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<sup>749</sup> Wong, *Why They Fight: Combat Motivation in the Iraq War*; Bury and King, ‘A Profession of Love?’.

<sup>750</sup> Walker, *Reserve Forces and the British Territorial Army*, 102, 105.

<sup>751</sup> *Ibid.* 106.

have to get them together and do this sort of thing to build up the unit.<sup>752</sup> While it is to be expected that the officer who organised the event would understand its objective, it was very interesting to note afterwards the degree to which the importance of social cohesion in the sub-unit was recognised by all ranks.<sup>753</sup> Indeed, this was directly related to cohesion by a respondent without prompt:

- R1: ‘...There’s always something going on ... that sort of [social] activity. Like this weekend we all got together. It’s a bit hard at the moment because it’s like going to a new school; you are getting to know everyone over all again. It’s weekends like this, which is a bit of a jolly really... But it’s good... they want us to gel.
- Mod: So is that the focus this weekend, just to get together as a group?
- R1: Well the focus is company cohesion.
- R2: Yes, it is.
- Mod: Wow.
- R2: Yes, yes. And that’s why they are making a massive effort with the Hawaiian night. It’s not just so we can just get bladdered – well it is – but the idea of it is so [two former detachments now centralised in the new sub-unit] just start gelling a bit more.<sup>754</sup>

‘I think it [socialising] plays a vital part... because it’s where you sit down and talk and get to know each other. I said to the guys, when we first moved over to the battalion, in a way I felt like a new recruit again, because you got to know everybody in the regiment that we were with, then you leave that and start off with a completely fresh set of guys, so you sort of feel like a recruit again because you don’t bloody know anybody. So yes, the social side of it is, I think, vital.’<sup>755</sup>

This use of socialising to generate and maintain interpersonal bonds in sub-units created by FR20 was also reported in other units, where there were interesting distinctions made by former infantry:

- Mod: ‘Do you think the Army Reserve delivers on that social element in general?’
- R1: Yes. This year [since joining their RLC sub-unit], anyway.
- R2: With the infantry, you didn’t get much of that, compared to the [Royal Logistics] Corps. So I’ve seen a lot more fun activities than beforehand.<sup>756</sup>

Another junior soldier made a similar point about adventure training activities.<sup>757</sup> Interestingly, these comments were all recorded in individual-skilled sub-units. Taken

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<sup>752</sup> Interview 9.

<sup>753</sup> Interview 9.

<sup>754</sup> Interview 7.

<sup>755</sup> Interview 7.

<sup>756</sup> Interview 6.

together, this evidence suggests that socialising together is consciously viewed by commanders and soldiers alike as central to generating solidarity in newly-formed and established units. It also indicates that individual trade-focused logistics units may rely more on socialising for generating their cohesion than the regular and reserve infantry who collectively train more frequently. Indeed, the evidence suggests that interpersonal bonds may be more important for understanding reserve logistics cohesion than the literature on the professional regular infantry recognises.

To specifically examine the importance of social cohesion in the reserves, all interviewees were directly asked about the value they placed on the social element of their service. The social element was left for respondents to define and describe as they wished; some referred to time spent socialising in the bar, others the bonds between colleagues. However, across ranks, the unanimity and strength of response was notable:

‘The social element, I think, is important.’<sup>758</sup>

R1: ‘It’s key. If you don’t have the social element... it can’t be all work and no social, because it is a lifestyle. The guys do deserve to get rewarded and there needs to be a balanced work/social environment.

R2: ‘The guys are giving up their free time. They don’t have to be here. So there’s a point where you need to sit down and give them something back.’<sup>759</sup>

‘It’s massive.’<sup>760</sup>

‘That’s a massive thing.’<sup>761</sup>

R1: ‘Hugely important.

R2: Got to be. Yeah, massively.’<sup>762</sup>

‘It’s important. It’s important for... a bit of an army lifestyle, isn’t it? You’ve got to have that.’<sup>763</sup>

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<sup>757</sup> Interview 5.

<sup>758</sup> Interview 3.

<sup>759</sup> Interview 6.

<sup>760</sup> Interview 1.

<sup>761</sup> Interview 5.

<sup>762</sup> Interview 11.

<sup>763</sup> Interview 10.

Clearly, the social aspect of reserve service itself – that which generates and sustains interpersonal bonds – is deemed very important to logistics reservists. Primarily, it is viewed as a vital part of these soldiers' service in and of itself, but also as a balancing reward for part-time volunteers' commitment to training and other duties. Moreover, this social element, with its organised events and socialising in the bar after duties, was also stated to be reflective of the regulars. As other ex-regulars and reservists elucidated:

- R1: 'I joined the reserve after leaving the regs because I was missing the craic with the boys, the laughs, the banter...'  
R2: One of the best things about the regs is the social life, you know, your summer balls and your Christmas balls. Again, regular social events... seem to have carried over to the reserves as well.'<sup>764</sup>

'That's why I joined, really, [to] meet new people.'<sup>765</sup>

For these reservists, social events in the reserves are normalised by reference to similar practices in the regulars. Moreover, the social element provided a primary joining motivation for these soldiers. Indeed, the complimentary surveys revealed that 86 percent of RLC and REME reservists had joined to make new friends in the military, one of the top two most cited reasons for joining.<sup>766</sup> Overall, this data indicates that time spent socialising together is very important for reservists' motivations for joining, and most importantly perhaps, for wider social solidarity in their sub-units.

However, the importance of social cohesion in these sub-units goes beyond a shared appreciation of the solidarity generated by simply socialising together. In fact, many units described the nature of their social relations in terms of being a 'family'. Interestingly, some of the most cohesive and professional regular infantry units in the British Army also describe themselves as 'family regiments'.<sup>767</sup> This is usually

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<sup>764</sup> Interview 8.

<sup>765</sup> Interview 10.

<sup>766</sup> Bury, 'Recruitment and Retention in British Army Reserve Logistics Units', 13.

<sup>767</sup> For example, 1 Royal Irish, which consistently has the highest retention rate amongst British infantry regiments.

interpreted as indicating dense associative patterns and strong interpersonal bonds across ranks, coupled with long histories of regimental service amongst certain families, and the often regional identity of the unit and its members. Regular British family regiments are therefore traditionally viewed as being highly socially cohesive. Decisively, this can be exclusive of, or complimentary to, professional competence. A similar family motif was consistently repeated in interviews with reserve sub-units:

- R1: ‘We actually formed a very tight knit family.
- R2: A lot of infantry regiments work. They don’t work because they are soldiers, that they are tradesman or whatever. They work because -
- R3: They are family.
- R2: - they are such a good family group... My old infantry [unit], it was like having 500 brothers.
- R1: But it is like being in an infantry regiment here, where you’ve got that family atmosphere. People looking out for one another...
- R3: What’s your opinion, [NCO name], because you’re part of the building that has stayed?
- R4: Well, I’ve been here a long time. I’ve seen a lot of change. But it is one big family. You can share your problems with people.’<sup>768</sup>

The above quote is highly illustrative. Firstly, it displays an awareness of the influence dense, familial-like bonds can have in infantry regiments ‘that work’; that are effective. Indeed, this NCO is making an explicit association between strong interpersonal ties and effective unit performance. Secondly, these reservists’ perception of family appears to be slightly different from the regulars. Their unit’s ‘tight knit’ family is described as being based on ‘looking out for one another’ and ‘sharing problems.’ Reservists from other sub-units echoed these sentiments almost exactly:

- R2: ‘There is a massive sort of family vibe thing.
- R3: It is a proper family job up here.’<sup>769</sup>

‘Basically it’s like, I suppose, you can call it somewhat an extended family sort of thing.’<sup>770</sup>

‘I don’t see these lots as mates. They’re more as family.’<sup>771</sup>

Interpersonal relationships are therefore frequently described in profoundly social terms; they frequently surpass civilian friendship to become deeper, familial ties.

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<sup>768</sup> Interview 2.

<sup>769</sup> Interview 1.

<sup>770</sup> Interview 5.

<sup>771</sup> Interview 2.

Crucially, these attributes match almost exactly those identified in the primary group explanation of cohesion by Shils and Janowitz.

Other reservists remarked on the importance of these relationships to their continued service:

- R1: ‘When I look back to mates who I’ve met through the TA, it is a big thing. I go out and socialise more with people from here than what I do with any of my work colleagues... I love being round the people here.
- R2: Aww!
- R3: It’s not mutual, though. [Laughter].’<sup>772</sup>

The first respondent’s assertion that his reserve colleagues are his civilian friends and that he chooses to socialise with them outside of duties is interesting. Indeed, such is the depth of this social/emotional bond that he professes his love for them. This expression results first in tenderness from a female colleague, but is quickly followed by ridicule by a male, indicating both the uniqueness of the confession and the unease amongst other group members at directly expressing the depth of the social bonds between them. This, of course, indicates their importance, and similar observations were made across other sub-units:

- R1: ‘Most of my mates now that I can call my mates are these guys here. Civvy lads who I went to school with, I say hello to them, but these are my mates.’<sup>773</sup>
- R1: ‘I, personally, quite enjoy coming down here for the friendship and that sort of stuff.
- R2: They always have the bar open, even if there’s only a few of us. We’ll have a chat.
- R3: ...You’ve got to get on with who you’re working with, haven’t you?’<sup>774</sup>

While these quotes provide further evidence of the importance that socialising together is perceived to have on in these sub-units, it is important to note here that collective training also plays a major part in generating social solidarity amongst reservists. The stress of training often builds interpersonal bonds through shared hardship and reliance on others. Professional training is conducive to social bonding in its own right. Thus,

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<sup>772</sup> Interview 5.

<sup>773</sup> Interview 1.

<sup>774</sup> Interview 10.

with FR20 pledging to increase training, the social bonds generated by socialising within the reserves would be expected to be strengthened further. However, the last quote above is particularly indicative about reserve cohesion. In *The Combat Soldier*, King describes how some Royal Marines' rescued a comrade that they did not like who was wounded and pinned down by enemy fire.<sup>775</sup> King argues that this represents the importance of professional comradeship over interpersonal ties; elite professional infanteers do not need to 'like' each other to perform effectively. Crucially, the reservist above seems to indicate that harmonious social relations are desired, if not required, in his sub-unit. Interpersonal bonds appear to matter more to reserve logistics units than they do in the elite infantry.

One simple definition of cohesion is the ability of the group to stay together under stress,<sup>776</sup> and there is also ample evidence to suggest that social bonds remain a key motivating factor for remaining in the reserves. The centrality of social cohesion was highlighted by one NCO, who stated: 'I think if there hadn't been a bit of social [life], I would have handed my kit in two years ago.'<sup>777</sup> Thus, the social element of service is often a critically important retention factor. Indeed, it was responsible for this soldier remaining in service despite the organisational frictions he experienced as a result of FR20. Another reservist went further:

'It's the thought that if I do leave or whatever, I am going to be jacking [letting down] on my mates or the other people there. And you'd miss it because you would want to know what they're doing. And I think that's what keeps you coming back even though it's been really bad.'<sup>778</sup>

For this NCO, social bonds are described as the central reason for his attendance at sub-unit training events, but also for his continued service in the wake of poor experiences of FR20. Crucially, he describes his motivation for remaining in service in terms of a

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<sup>775</sup> King, *The Combat Soldier*.

<sup>776</sup> Siebold, 'The Science of Military Cohesion', 44.

<sup>777</sup> Interview 2.

<sup>778</sup> Interview 2.

strong sense of social obligation, to avoid ‘jacking on my mates’. Moreover, this is explained in emotional rather than professional terms; that he would miss his colleagues and not knowing what they were doing. An officer in a different unit elucidated on why the reservists under his command frequently attended training: ‘They’re mates... so if they don’t turn up its: “Where were you?”’<sup>779</sup> Thus, complimenting the importance of the social aspect of reserve service for reasons for joining, it appears that interpersonal bonds provide a central explanation for reservists’ frequent attendance at training and their long term retention. Moreover, the nature of social relations between these reservists has consistently been described as those of friendship, or more profoundly as family. As the data in Chapter Seven shows, this appears to differ somewhat in regular infantry units, and in contrast to the cohesion King describes, it is perhaps not too far to suggest that in these logistics sub-units social bonds provide a strong motivating factor for effective individual performance. Social cohesion appears to be more important in these units than in the regular and elite infantry King examined.

### **The Decline of the Drinking Club**

Referring to civilian groups, John Bancroft has outlined how alcohol can be used to heighten ‘group cohesion and solidarity’,<sup>780</sup> and in a later work on British officer corps, I outlined the importance of the consumption of alcohol in generating their social solidarity.<sup>781</sup> Walker also noted this amongst TA officers in particular.<sup>782</sup> In fact, the social cohesion-generating function of collective alcohol intake has long been recognised by the British Army, and is reflected in the very cheap alcohol available in mess bars and NAAFIs in almost every barracks. Given the greater emphasis on social cohesion in the reserves, it is therefore perhaps not surprising that in the past the TA

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<sup>779</sup> Interview 8.

<sup>780</sup> Bancroft, A. (2009) *Drugs, Intoxication and Society*, Cambridge: Polity, 62.

<sup>781</sup> Bury, P. (Forthcoming) ‘Barossa Night: Cohesion in the British Army Officer Corps’ *The British Journal of Sociology*.

<sup>782</sup> Walker, *Reserve Forces and the British Territorial Army*, 105-6.

was often perceived as a ‘drinking club’. This term was ubiquitous and often used derogatively, but it indicated a view held across the regular army, in some reserve units, and amongst knowledgeable civilians, that socialising in the TA was emphasised over training.

The ‘drinking club’ theme emerged as a major descriptor for differentiating between the pre- and post-FR20 reserve army. The following quote not only highlights the centrality of alcohol to the TA experience in the past, but also supports the arguments made about the importance of individual skill in effective collective performance in logistics units, in this case the precursor to 165 Port and Maritime Regiment:

‘In the days of the National TA, the [reservist] dockers used to come down and unload the ships to give 17 [Port and Maritime regiment - the regulars] some time off. They’d come down for two weeks [their annual training camp], but because they were professional dockers they could unload in half the time 17 could. So each ship would be done by lunchtime and they’d spend the rest of the time in the Corporal’s Mess getting hammered. The Mess used to take more in those two weeks than in the other 50.’<sup>783</sup>

However, this drinking club ethos was not confined to logistics units. Another former infantry reservist reported a similar experience:

‘When I first joined in ‘97, my God, we used to jump on a 4-tonner [truck], go to Thetford and knock back three or four crates of lager, jump off, rock up, harbour, and you’re out on exercise all weekend. It was a drinking club.’<sup>784</sup>

Both REME and RLC reservists echoed this sentiment:

‘When I first joined the TA... it was a bit of a drinking club. We were all out on the lash every weekend, all together, and all having a good time.’<sup>785</sup>

‘There were a lot of lads... all they were interested in doing was getting in the Sergeant’s Mess at night and getting pissed and rocking up the next day stinking of ale. When you’d try to do any trade training they were that rough [they couldn’t do it].’<sup>786</sup>

‘Back in the ‘80s... it was a drinking club.... When I was with the regulars, the TA was scum.’<sup>787</sup>

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<sup>783</sup> Interview 26.

<sup>784</sup> Interview 1.

<sup>785</sup> Interview 5.

<sup>786</sup> Interview 1.

<sup>787</sup> Interview 2.

‘In the early 90s it was a drinking club.’<sup>788</sup>

Clearly, a widespread perception exists that TA activity was often centred on the consumption of alcohol to the detriment of training activity. Socialising with alcohol was a priority in the past. This, of course, provided easy means by which the professional regulars – themselves no strangers to drinking culture – could denigrate their TA rivals. Indeed, such is the prevalence of this motif for the pre-FR20 reserves that it indicates how the ‘drinking club’ label became a byword for describing the perceived unprofessionalism of the organisation in general. Crucially, however, it also shows how today’s reservists have internalised the values of the professional regulars, thus indicating the importance of regular values in setting norms in today’s Army Reserve.

Despite the continued existence of the drinking club metaphor, there is much evidence that perceptions of its continued validity are waning. This was widely perceived to be a result of the gradual professionalisation of the TA since 2003, and more recently, as a direct result of FR20. The following responses are representative:

Mod: ‘Do you think it’s [the drinking club ethos] changing in the reserves?’

All: Yes.

R1: Big style.<sup>789</sup>

‘It was a drinking club. Now it’s not.’<sup>790</sup>

‘It used to be a drinking club, even two years ago it was. The boys would come for a beer the chance to get away from their wives.’<sup>791</sup>

For the respondent above, a regular soldier attached to the reserves, the introduction of the FR20 was critical to the decline of the drinking club ethos. Furthermore, numerous reservists directly made the link between this and increasing professionalism:

‘The level that you have got to be at, the [professional] standard, it’s not a drinking club now, which it used to be.’<sup>792</sup>

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<sup>788</sup> Interview 7.

<sup>789</sup> Interview 8.

<sup>790</sup> Interview 8.

<sup>791</sup> Interview 24.

<sup>792</sup> Interview 7.

‘It has moved on somewhat in the last 30 years and it is a more professional unit than it used to be. But it is still down to the attitude of the people of the regular army.’<sup>793</sup>

‘It wasn’t just the TA [that was a drinking club]. The regulars were just the same. For one reason alone: that was the culture that we lived in.’

The last two quotes are especially informative as they attempt to explain the TA’s drinking club ethos as a reflection of the dominant culture at that time in both the regular army, and wider society. Despite the prevalence of the drinking club motif, numerous interviews indicated that while this was seen as a valid label to describe the TA’s lack of professionalism in general, it was not applicable to their sub-units in particular.<sup>794</sup> This, of course, not only highlights the sensitivity of some sub-units of being tarnished with this label; it also indicates their desire to be viewed as professionals.

While the increased training standards associated with FR20, and the policy drive to reduce drinking in the regulars have no doubt contributed to the general decline of the drinking club,<sup>795</sup> there was a recognition that this culture needed to be explicitly addressed in some sub-units in order for this to happen. As one officer commented: ‘We have definitely professionalised as a unit. With the drinking club, there was a culture to break, and we have... The message went down that you’d better be ready for duty in the morning or standby.’<sup>796</sup> A senior officer elucidated that he had introduced a ‘dry weekend rule’ in order to underline that reserve service in his unit would not be tied to the consumption of alcohol.<sup>797</sup> Another officer in the same unit commented on the effect this had already had: ‘Yeah, it is changing. And if that means some of the old and bold turn to the right and march off, then so be it... maybe that’s not such a bad

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<sup>793</sup> Interview 2.

<sup>794</sup> Interviews 5, 7, 24.

<sup>795</sup> *Soldier Magazine*, August 2016, 12.

<sup>796</sup> Interview 23.

<sup>797</sup> Interview 26.

thing.<sup>798</sup> Numerous other interviews supported this assertion that over recent years – either directly through the chain of command or indirectly by more subtle changes in sub-unit culture – those who saw reserve service only in terms of recreational drinking were being ‘weeded out’.<sup>799</sup> Other sub-units reported a decline in social events in the wake of FR20. Whether this was intentional or not was not revealed, but most reservists accepted it as the price of professionalisation; there is now less time for social events as the focus is on training.<sup>800</sup>

Although they are widely viewed as complimentary and – in the TA’s case – intertwined, there is a distinction between social cohesion and alcohol consumption. This was made by a number of reservists. One NCO stated that the Army Reserve of today ‘is a social club mainly, not a drinking club’<sup>801</sup> thereby affirming the decline of the centrality of alcohol consumption but also the remaining importance of interpersonal bonds to reserve cohesion. Another officer elucidated:

‘I haven’t noticed a decrease per se, there’s still the social side to army drinking, but a lot of time after training we’d go to the bar and everyone has a Coke...the bar’s ambience and the extra time we have there on top of training is good for getting J1 [personnel issues] done. So in terms of social cohesion, it’s important, even if people aren’t drinking.’<sup>802</sup>

For this officer, the Mess remains an important site for generating and sustaining social solidarity, even though the consumption of alcohol is rarely the focus. Indeed, without alcohol, the distinction between mess activity and professional duty appears to be increasingly blurred, allowing as it does administrative issues to be addressed and thereby enhancing sub-unit effectiveness. Supporting this, another officer spoke of how

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<sup>798</sup> Interview 27.

<sup>799</sup> Interviews 2, 24.

<sup>800</sup> Interview 5, 10.

<sup>801</sup> Interview 24.

<sup>802</sup> Interview 24.

‘a lot of networking is done up in the messes’.<sup>803</sup> As such, the drinking club may be in decline, but the club itself remains profoundly social, and indeed, professionally useful.

### The Rise of Professionalism

Asked whether social cohesion had previously been based around the consumption of alcohol, one NCO stated: ‘I think it was... the new way – the [regular] army way – is about courses.’<sup>804</sup> While this quote underscores Chapter Six’s findings on the increased availability of courses as a result of FR20, it also points to something more profound. This chapter has already shown how FR20’s drive for professionalisation has resulted in a concerted move away from alcohol-based social cohesion. As the NCO above suggests, the new professionalism of the reserves is increasingly based on that of the regulars; on training and competency. The processes by which reserve logistics sub-units are professionalising, and their implications, are closely related to understanding cohesion in these sub-units, and the overall impact of FR20. They are therefore worthy of further examination here.

In reserve logistics units, qualifications gained through attending courses, and importantly, operational experience, are increasingly viewed as the standard by which individual reservists judge themselves *vis a vis* the regulars. This new, more professional attitude appears to have gradually percolated into the TA during the increased deployment of reservists on operations in the 2000s. As one officer surmised:

‘Part of this change of culture is stemming from the two major operations that we’ve had to run over the last ten years or so. I don’t think the army reserve, or TA as it was then, was in a particularly good state [then]. I think the culture was massively wrong... But we fought through that, and a lot of people have done tours in both theatres, some even double or triple [tours]. And I think there’s a lot of respect that’s been generated because of that...’<sup>805</sup>

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<sup>803</sup> Interview 11.

<sup>804</sup> Interview 25.

<sup>805</sup> Interview 3.

Indeed, some reservists described the TA at this time as a ‘liability’ to the regulars.<sup>806</sup>

This sentiment was echoed in other sub-units and across ranks, as the quote below shows: ‘When I was in the regulars years ago - when it was the Cold War - the TA was a joke. It’s got more professional since 2003.’<sup>807</sup> Again, this reservist’s disassociation from the old, unprofessional TA is notable, but, underpinning FR20, the importance of post 9/11 operations on reserve professionalism is clearly viewed as a critical source of transformation. As such, at an organisational level, working with the regulars has professionalised the reserves in and of itself.

However, perhaps most importantly, the increased exposure to the regulars on operations has imbued a growing perception amongst reservists of their service being a job. The government’s 1978 Shapland Report on the TA noted that although service in the organisation was ‘demanding hobby’ it was a hobby nonetheless.<sup>808</sup> In the late 1980s senior officers also admitted to Walker that reserve service was a distant third priority after family and work life.<sup>809</sup> While that order of priority may remain, the conception of service in the Army Reserve appears to be changing. This is occurring in two distinct ways. Firstly, with the increased training burden, reserve service is now viewed as a job, albeit usually a part-time one, with the accompanying level of commitment and attention to detail required:

- R1: ‘Even in the six years that I’ve been in, it’s gone from being a hobby to being a part-time job. You wouldn’t miss your full-time job so you can’t miss your part-time job either.
- R2: … [It’s part-time but] It’s still a job.’<sup>810</sup>

In tandem with the decline of the drinking club, reserve service – despite being part-time and still more reliant on social cohesion than the regulars – is not viewed as a hobby anymore. The second distinct way the reserves are drawing closer to the regulars

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<sup>806</sup> Interview 7.

<sup>807</sup> Interview 5.

<sup>808</sup> Walker, *Reserve Forces and the British Territorial Army*, 6.

<sup>809</sup> Walker, *Reserve Forces and the British Territorial Army*, 44.

<sup>810</sup> Interview 5.

concerns individual reservists' performance in their role. Increasingly, reservists must be individually competent enough to 'do their job'. The importance of individual competency in order to work alongside the regulars safely and effectively was repeatedly emphasised:

'You have to be at that standard. You cannot think that you can rock up to a [regular] unit [not at their standard], because you've got to remember who you are representing as well.'<sup>811</sup>

'It's just getting the experience of being deployed, having the confidence and the experience.'<sup>812</sup>

R1: 'I did three tours. Kosovo 2000/2001, Iraq 2003/2004 and I've just done a year in Guam... As long as you can do the job, no problems.

R2: ... You need to prove yourself you can do the job.'<sup>813</sup>

The ability to fulfil their role competently on operations alongside the regulars is the final standard by which these reservists judge their own professionalism. Another explicitly commented on how the regulars' performance acted as the yardstick by which he and others measured his own professional competency: 'You test yourself a bit... in your mind they [the regulars] benchmark against someone of the regular rank equivalent.'<sup>814</sup> While the fact that the reserves could never hope to have the full capability of the regulars due to its part-time nature was recognised,<sup>815</sup> doing your individual job to the standard of the regulars is now seen as the benchmark for competency in training, and that which must be achieved on operations. For most of its members, the Army Reserve is now a part-time job. For others it is a full-time job. Interestingly, the 'Do Your Job' ethos that is emerging in the reserves exactly replicates those of some of the most successful professional sports teams.<sup>816</sup>

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<sup>811</sup> Interview 7.

<sup>812</sup> Interview 5.

<sup>813</sup> Interview 6.

<sup>814</sup> Interview 1.

<sup>815</sup> Interview 2.

<sup>816</sup> Hart, A. (2015) 'Top 10 "Do Your Job" Patriots' available at

<http://www.patriots.com/news/2015/07/17/top-10-do-your-job-patriots>, retrieved 20 July 2016.

One reason for this resonance is this ethos is imbued with a deeply personal commitment to the correct execution of individual duties in order to benefit the team. In doing your job, personal and collective status is therefore at stake. Supporting King's observations on status honour in the elite infantry, there are signs that army reservists are becoming increasingly aware of the need to earn and maintain their professional status by the measures defined by the regulars. While sensitivity about the regulars' perception of reserve professionalism no doubt existed before the post-2003 deployments, it appears that greater exposure to the regulars on operations, and more recently as a result of the better integration of FR20, has increased this sensitivity. As a result, across all the sub-units there was a desire, sometimes explicit but often latent, to be viewed as being as capable as the regulars. Again this was usually compared with reference to individual performance on operations. This desire to match the professionalism of the regulars in order to maintain not only their own status and that of their sub-unit, but also by extension, the reputation of the Army Reserve, was most forthrightly put by an ex-regular: 'We have to be at that standard because otherwise we are letting ourselves down.'<sup>817</sup> Other members of the same unit elucidated:

- R1: 'I mobilised with 3LSR [Logistic Support Regiment] to Afghan in 2013... We had to be up to the standard of a regular soldier. We had to... Because you don't want to turn up to that unit looking like a bag of shit, not knowing what you are doing.  
R2: Got a bit of a bad rep, haven't we?'<sup>818</sup>

Indeed, the professional reputation of individual reservists or their sub-units appears to be very important to most reservists:

- R1 'They [the regulars] hate us. We've got such a bad name because of these guys.  
R2: Because of the old [sub-unit] was so dodgy and cut corners... they made so many mistakes.  
R3: They coated [Camp] Bastion in fuel.  
R1: Now we're [new sub-unit], when we go down there people are, like, 'Oh, who are you with?' 'We're with [new sub-unit],' all excited and

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<sup>817</sup> Interview 7.

<sup>818</sup> Interview 7.

happy like little puppies and they're, like: 'Err... fuck off,' because of stuff that happened. We've inherited their bad reputation.<sup>819</sup>

This quote is interesting as it not only highlights the lack of professionalism before FR20, but also the increasing sensitivity to the enduring impact of bad reputation as closer integration is undertaken in its wake. Another interview revealed an incident where a regular infantry platoon commander had been forced to move two reservists out of his unit for their consistent failure to perform to the expected standard on patrols in Afghanistan. These soldiers' conduct embarrassed their fellow reservist colleagues.<sup>820</sup> As these negative experiences show, professional reputation clearly matters deeply to these reservists. Furthermore, the evidence suggests that this sensitivity to status may be particularly pronounced amongst junior ranks, who are potentially less sure of their own abilities.

The surveys also revealed some interesting findings. 44 percent of respondents agreed that they worried a lot about meeting the expected professional standard in their sub-units, with 33 percent disagreeing. By comparison, a regular infantry sub-unit recorded 50 percent in the category, and 22 percent disagreed. Interestingly, 52 percent agreed that it was more important to be a good soldier than to be liked, with only 15 percent in the disagree category, indicating the importance of professional values. This figure almost matched (54 percent agreement, 10 percent disagreement) that recorded a regular infantry sub-unit, and was supported by another question concerning the risk of 'deviant cohesion' that Donna Winslow identified can be a problem in units with too high levels of social cohesion and not enough discipline.<sup>821</sup> Asked whether it was more important 'to be "one of the lads" than a good soldier' in their sub-unit, 68 percent disagreed, and only 12 percent agreed. There therefore appears to be a strong awareness

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<sup>819</sup> Interview 1.

<sup>820</sup> Interview 5.

<sup>821</sup> Winslow, D. (1999) 'Rites of Passage and Group Bonding in the Canadian Airborne', *Armed Forces and Society*, 25(3).

of the limits of social cohesion that are balanced with the need to be a professional. Thus, there has been a gradual permeation of the regulars' ethos and norms into the reserves. This has been furthered by the transfer of ex-regulars into the Army Reserve in the wake of FR20. The reforms are therefore gradually shaping reservist attitudes, bringing them in line with those of the full-time professionals. Nevertheless, for the majority of reservists, the regulars are the final arbiters of their professionalism.

Given this widespread sensitivity to regular perceptions, the potential damage to individual and collective status caused by poor performance can be expected to motivate reservists in a similar manner to the status honour King observed. While this may still be much more pronounced in elite infantry, it does appear that most reservists have become more sensitive to their professional reputation as a result of closer integration with the regulars. Evidence of this was also revealed in reservists' positive experiences on operations, where being mistaken for a regular was a recurring story told to indicate individual competence. One officer recounted a regular colleague asking if a reservist under the former's command was TA. When he replied that she was, he received the comment: "I just automatically thought she was so professional that she was a regular."<sup>822</sup> Accounts such as this were repeated frequently, and were always told with palpable pride. For example: 'The guys that I was on tour with didn't even realise I was TA until about a month before we were leaving theatre, and they went, "What, you are TA? I didn't realise you was TA."<sup>823</sup> Professionally therefore, the best thing for a reservist is to be mistaken for a regular on operations due to their performance. Meeting or exceeding the performance expected of a regular on operations is thus the gold standard for a reservist. Thus, in performing like a regular, a reservist can become an honorary professional. Moreover, this hard-earned professional status is not always

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<sup>822</sup> Interview 3.

<sup>823</sup> Interviews 1, 7.

temporary. Reputation has been established and as long as it is maintained by performance, it will be continue to be acknowledged in the reservist's network. This was revealed by many reservists who cited the much more welcoming response from regulars with whom they had deployed and proved themselves to. For these individuals, their hard-earned reputations allow them access to the coveted professional status group policed by the regulars. Similarly, as we have seen, poor performance can result in long term ostracism by the regulars

By better integrating the reserves with the regulars, FR20 is slowly instilling a professional culture in the sub-units in this study. This is evidenced by reservists' desire to distance themselves from the drinking club motif; an increasing awareness of the standards expected on operations; a widely held view that reserve service is no longer a hobby; and greater sensitivity about their personal and collective professional reputation which must be earned and maintained by competent performance. In short, reservists increasingly see the regulars as the benchmark for performance and seek their approval, which confirms their own status. However, while these processes indicate the reserves' rising professionalism, there is ample evidence to suggest that it has not met the standard the regulars expect. Supporting Connelly's recent findings on the limits of integration, reservists found regular attitudes to them as frequently less than positive, but slowly changing:

R1: 'I deployed with the infantry in 2007. Trust me. It hasn't changed.  
R2: It was a lot worse, I think.'<sup>824</sup>

'They hate us.'

R2: 'I think it's going to take a lot longer for the Regular Army to recognise the Reserve. To see how competent they are. It's going to take a few more years.  
R3: ... [But it] has changed a lot over the last couple of years.'

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<sup>824</sup> Interview 5.

<sup>825</sup> Interview 1.

<sup>826</sup> Interview 6.

Some were much more positive, stating: ‘They were brilliant to us’ or ‘It does work. There’s a mutual respect there’,<sup>827</sup> while numerous others pointed out that the success of sub-unit integration depended heavily on the command culture in the units concerned and on personal relationships.<sup>828</sup> As with sub-units’ experiences of FR20, the mixed responses support the importance of the command environment in this regard. As such, despite progress, there appears to be some way to go before reservists perceive regular attitudes to them to have changed considerably. Indeed, this is supported by the results of the 2016 ResCAS survey which found that only 32 percent of Army Reservists felt valued by the regulars.<sup>829</sup>

Nevertheless, despite gradual professionalisation, the importance of social cohesion still persists. In order to examine the extent to which sub-units had professionalised, the group interviews asked the blunt but pertinent question whether ‘unit members viewed each other as professionals or mates first?’ The responses below are indicative:

All: ‘Mates.

R1: I think that’s one of the biggest differences between the [reserves and regulars].’<sup>830</sup>

R1: ‘Mates.

R2: Family.

R3: Family, yes.

R4: Family, definitely.

R5: Yes, yes, yes, definitely.’<sup>831</sup>

Mod: ‘Would you be mates with someone who is below the expected standard of their rank and their experience?’

R1: No.

R2: Yeah, we are. The thing is, we all have to help each other out.

R3: It’s still a family.

R4: … You work as a family, I think. Once you’re in here, you’re family.’<sup>832</sup>

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<sup>827</sup> Interviews 3, 7.

<sup>828</sup> Interviews 2, 3, 7.

<sup>829</sup> Ministry of Defence (2016) *Reserve Continuous Attitudes Survey June 2016*, available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/532522/20160630-RESCAS\\_2016\\_Report\\_v2.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/532522/20160630-RESCAS_2016_Report_v2.pdf) retrieved 21 September 2016.

<sup>830</sup> Ex-regulars, in interviews 5, 8.

<sup>831</sup> Interview 7.

R1: ‘No. We’d be friends.  
R2: But not in the same way.’<sup>833</sup>

Other RLC and REME reservists were asked in a complimentary survey whether they would be friends with a colleague who was ‘not up to the required professional standard’. Surprisingly, 70 percent agreed or strongly agreed that they did, indicating the locus of cohesion in these units.<sup>834</sup> While the same percentage was recorded in a regular logistics sub-unit, in a regular infantry sub-unit this was only 50 percent. The overwhelming majority of not only logistics reservists, but also an indicative sample of regulars, therefore continue to describe the nature of the relationships with their comrades in profoundly more social terms than in the infantry. This seems to suggest that despite ongoing professionalisation, social cohesion remains central to understanding the associative patterns between most of these reserve logisticians. But as the quote above indicates, there were some who did not view their relations in the same way, but in the more professional terms that have been identified in the elite infantry, where failure results in acute and immediate ostracism.<sup>835</sup> Indeed, amongst higher ranks with more responsibility there were more qualified, if broadly similar, responses:

R1: ‘That’s a fine line because some of us have worked together 20 years.  
R2: In this room, mates.  
R3: Can you not switch off from being a mate to a professional soldier when you need to?  
Mod: You can, of course, yes.  
R3: I can be friends with so-and-so, and when it comes to Friday night we turn into a professional soldier.’<sup>836</sup>

‘They’re kind of linked and it’s quite hard to distinguish between a mate and a good soldier, because if they were a wank soldier would you be their mate? No, because you’d probably be embarrassed.’<sup>837</sup>

R1: ‘It depends what the situation is. If we’re together in bar, it’s mates. But when we’re here on a Wednesday night, and we’re doing stuff, it is

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<sup>832</sup> Interview 10.

<sup>833</sup> Interview 1.

<sup>834</sup> Survey data collected 2015.

<sup>835</sup> King, *The Combat Soldier*.

<sup>836</sup> Interview 6.

<sup>837</sup> Interview 1.

professionals. It's got to be professionals. Ex-regular and all that, you've got to be professional.<sup>838</sup>

This understanding of professionalism as situationally-dependent is not unexpected given the literature on how reservists negotiate their identity. But it does indicate that notions of professionalism amongst these soldiers, and hence the sources of cohesion, are more fluid than in regular forces. It appears that even amongst more senior reservists and ex-regulars, interpersonal bonds still remain important, and that in the reserves professionalism can be switched on and off as required.

## Discipline

In *The Combat Soldier*, King explicitly links the rise of professionalism in regular armies with a change in the sources of their discipline. Citing numerous historical examples, King argues that Western conscript armies of the early-mid twentieth century relied heavily on the threat of punishment to maintain battlefield discipline and encourage combat performance.<sup>839</sup> In modern professional armies, however, he argues that discipline is much more reliant on the self-discipline of soldiers. This is due to the increasing importance of status honour, and the threat of professional shame amongst volunteer soldiers who do not perform to the expected standard. In contrast to a lack of official punishment, King detailed the often serious sanctions applied to group members who fail to perform effectively, such a Parachute Regiment soldier ostracised for poor performance in training and a Royal Marine publicly ridiculed for similar conduct in combat.<sup>840</sup> For King, the intensive collective training conducive to heightened professional obligations between soldiers has changed the nature of military discipline

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<sup>838</sup> Interview 11.

<sup>839</sup> King, *The Combat Soldier*, 362-375.

<sup>840</sup> King, A. (2015) 'Discipline and Punish: Encouraging Combat Performance in the Citizen and Professional Army', in King, A. (ed) *Frontline: Combat and Cohesion in the Twenty-First Century*, Oxford: Oxford University Press.

in some Western armies. Indeed, in a later publication he contended that: ‘A new paradigm of military discipline seems to have emerged.’<sup>841</sup>

Interestingly, given King’s deep knowledge of elite forces, neither of these works cite Thomas Thornborrow and Andrew Brown’s fascinating case study of discipline and identity in the British Parachute Regiment. Like King, for these authors the aspiration to be an elite ‘Para’, and the threat of professional and social ostracism for failing to meet the expected standards, are central to explaining the high levels of self-discipline and individual performance in the unit.<sup>842</sup> Crucially, they show how the desire to conform to the heightened professional behaviour expected in elite regular units functions like a Foucauldian panopticon to monitor interactions and encourage performance.<sup>843</sup> Echoing King’s observations about the threat of group ostracism for performance failures, this occurs to such an extent amongst the Paras that even experienced senior ranks reported status anxieties during routine duties.<sup>844</sup> Thus, for both King, and Thornborrow and Brown, self-discipline and surveillance – both based on professional competence – are crucial to understanding performance motivations in elite and regular infantry units.

However, neither of these important works addresses the nature of discipline in non-infantry forces, nor in a reserve force that is gradually professionalising. In 1990, Walker noted that, due its volunteer history and ethos, TA discipline was ‘lax’ and ‘ad hoc’ compared to the regulars.<sup>845</sup> One TA officer’s comment at this time is illustrative: ‘there was a dull indifference to discipline, but a wonderful loyalty to duty’.<sup>846</sup> This quote indicates that at this time formal punishments were rarely resorted to and instead

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<sup>841</sup> Ibid, 112.

<sup>842</sup> Thornborrow, T. and Brown, A. (2009) ‘Being Regimented: Aspiration and Identity Work in the British Parachute Regiment’, *Organization Studies*, 30(4):364-5,367-8.

<sup>843</sup> Thornborrow and Brown, ‘Being Regimented’, 364-5,367-8.

<sup>844</sup> Ibid, 365.

<sup>845</sup> Walker, *Reserve Forces and the British Territorial Army*, 71.

<sup>846</sup> Ibid.

there was a high degree of self-discipline. The decisive fact that – despite ongoing integration with the regulars, and in contrast to them – every Army Reserve parade is still voluntary suggests that the nature of discipline may still be somewhat different from the full-time professional regulars.

The lower enforcement of military discipline in the reserves was frequently commented upon by reservists, and nearly always in reference to the application of Army General Administrative Instruction (AGAI) 67 system which governs both regular and reserve forces. For example:

R1: ‘The AGAI system is there, but we don’t need to use it.

R2: We have AGAI’ed people in the past.

R3: You don’t need it.’<sup>847</sup>

R1: ‘I think that’s [discipline] one of the biggest differences between the two.

R2: It’s much more relaxed, yes.

R3: More relaxed but the job still does get done.

R4: I think the job gets done better, personally.

R5: Obviously you need the discipline and all that in the regulars, but it is slightly relaxed [in the reserves].’<sup>848</sup>

R1: ‘If you try and do discipline like you would in the [regular] battalion, you would not have people turn up.

R2: ... it’s always going to be like that in the Reserve. You’ve got to have that...’<sup>849</sup>

These groups consisted of a number of ex-regulars, adding credibility to their claims that there is a different mentality to discipline in the reserves, but that the ‘job still gets done’. Moreover, AGAI 67 action was widely perceived by these reservists to be resorted to much more frequently in the regulars as their contractual and legal obligations compelled them to military duty and discipline in a way that, whilst also applicable to reservists, is simply unenforceable in reality. A regular adjutant (the officer responsible for discipline) attached to a reserve unit also supported these claims:

‘Discipline is different... the AGAI system is a blunt sword to be honest. The thing is, every parade is a voluntary one, and using the discipline system is

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<sup>847</sup> Interview 2.

<sup>848</sup> Interview 8.

<sup>849</sup> Interview 10.

contrary to what you are trying to achieve. But it is used and we do use it. You don't get it for in-surbordination or [bad] turnout; those incidents occur less than in the regs. To be honest, most of the discipline issues are alcohol-related, like the regulars.<sup>850</sup>

Other reservists noted the difference between reserve infantry and logistics units.

- R1: 'Discipline's slightly different. The infantry was more disciplined. Here it's...'
- R2: A bit more laid-back.
- R3: Relaxed.
- R1: To be honest with you, sometimes you'd rather have the infantry than here... you knew where you stood...
- R2: It's a different culture. The RLC tend to be more trade-specific whereas [the] infantry is more... it's a different ball game, really<sup>851</sup>

Somewhat contrasting King, and Thornborrow and Brown's, arguments these views are interesting as they indicate that these logistics reservists still perceive discipline in the regulars, and in the infantry, in the traditional terms of punishment, rather than the emergent paradigm of self-discipline. This acknowledgement reflects the reality of the regulars' different terms of service.

If the punishment system is not as frequently resorted to in the reserves, then how is discipline maintained? Unsurprisingly, the lack of use of the official discipline system compared to the regulars was consistently normalised by reference to the reserves' own distinctive discipline. For instance:

'It's a different mentality. I've got recruits, I can't drag them around the floor because they won't come in. I mean, they do do things wrong. I'm not one for shouting and bawling at people. I don't like being shouted and bawled at at work.'<sup>852</sup>

- R1: 'That's always been the best thing about the TA, isn't it?
- R2: ...That's the difference in mentality in the TA and the regs. A regs bloke would be like: "Get a fucking grip, sort your life out," and beast them until they get it right.
- R3: ....There's much more competition for promotion in the regs. Guys want to look better than somebody else...
- R4: They'll want to shine by dropping somebody else in the shit.'<sup>853</sup>

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<sup>850</sup> Interview 23.

<sup>851</sup> Interview 5.

<sup>852</sup> Interview 10.

<sup>853</sup> Interview 8.

For these reservists, discipline is perceived as reflecting a different mentality based on the identity of being a weekly volunteer for duty. This is conducive to a reluctance, perhaps more prevalent in logistics units, to robustly enforce standards through verbal and physical punishments associated with the traditional discipline of the regulars. As the last quote suggests, the lack of professional competition in the reserves is one reason for this. Another is that, without enforceable discipline, social cohesion is more important in encouraging correct behaviour and, ultimately, turnout in the reserves. This highlights recognition that resorting to the discipline system indicates the breakdown of social harmony which, as has been noted, are crucial for working relationships. The quote below is instructive:

R1: ‘If one of your brothers makes a FUBAR [Fuck Up Beyond All Recognition], how do you deal with it?  
Mod: You’re going to tell him.  
R1: And that’s what it’s like here. Sort of: “Come on. Don’t let the rest of the family down,” sort of thing... You don’t want the rest of the family to suffer for a simple mistake...’<sup>854</sup>

Maintaining the reputation of the unit is notable here, as is the deeply social terms in which this reputation is conceived. But related to this, the respondent is also suggesting that the informal enactment of social bonds – of social obligation – is used to encourage performance. Similarly, another NCO stated: ‘We tend to try and sort things out at a low enough level’;<sup>855</sup> that colleagues discipline each other informally for bad behaviour. Taken together these points are highly interesting as they suggest that reserve discipline may in fact be closer to that of the professional regulars than the reservists above initially acknowledged. In a similar but slightly different way to that observed by King and Thornborrow in elite units, the power of interpersonal bonds can encourage performance in the reserves.

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<sup>854</sup> Interview 2.

<sup>855</sup> Interview 2.

However, reservists were cognisant of the fact that the need for social solidarity has its dangers. ‘I think we should AGAI more people because the discipline sometimes is a bit close... Because we are volunteers and we all know each other, sometimes we do get a bit wishy-washy.’ Similarly, they noted how, like the regulars, informal punishments were much less robust, or ‘colourful’, than in the Cold War-era TA.<sup>856</sup> Nevertheless, there was a general sense that, despite the reluctance to use the discipline system, the reserves are still disciplined. According to one sub-unit commander: ‘There are far less discipline problems... [but conversely] there's less discipline in the reserves, and that's not because we're shying away from it, it's generally because the guys want to be here, they volunteer to come here, and they don't want to burn their bridges.’<sup>857</sup> This quote again highlights the perception that that reservists who volunteer for each parade generally have better self-discipline compared to some regulars. Similarly, the greater maturity of reservists in general and therefore a greater sense of trust between commanders and the ranks was frequently reported. Given the importance of social cohesion in these units, it was interesting to note how ex-regulars related this trust-based discipline to social events involving alcohol:

‘I think there's a little bit of a trust element as well. Generally the age of the reservist is slightly older than a Regular soldier. They know their boundaries, particularly with drink, whereas sometimes I find that it's very... verging on insulting where people [regulars] are actually monitoring and issuing you a can of Coke during your Christmas dinner because you're not deemed old enough or responsible enough to consume alcohol at six o'clock in the evening.’<sup>858</sup>

As another regular officer commented: ‘Yes, we can trust them... they don't take the piss as much.’<sup>859</sup> Trust, therefore, seems to play an important part in explaining discipline in the reserves. While this trust may rest more on social rather than professional obligations – and it is certainly different from Ben-Ari’s ‘swift trust’ generated in diverse regular units by standardised training procedures – it nonetheless

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<sup>856</sup> Interview 2.

<sup>857</sup> Interview 3.

<sup>858</sup> Interview 6.

<sup>859</sup> Interview 3.

exists. Indeed, reservists' recognised maturity also indicates the central importance of self-discipline in building this trust.

The importance of this maturity in explaining reserve discipline was also evident in how reservists dealt with unit members who performed badly. As detailed by Thornborrow and Brown, and King, and alluded to by a reservist previously, in the regulars the punishment for poor performance is frequently social and/or professional ostracism. Professional status brings with it the threat of professional shame. In the less professional reserves, the opposite appears to be the case. Faced with less time to train and therefore varying degrees of skill, instead of excluding failing members from the group, most reservists view such individuals as the target for development and encouragement rather than ire and exclusion:

- R1: 'We always help each other out. If someone's struggling with something...'
  - R2: Find out why.
  - R3: Help them.
  - R4: Find out why and help them. There's always a reason why. You can't be good at everything. You can be good at one thing and you could be better at another and what you do is you look at people who have got a strong point, put somebody maybe who's not so strong with them, and off you go.'<sup>860</sup>
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- R1: 'You sort of help them out, don't you?'
  - R2: ... It will be us helping them along and to better them. They could be shit at this, but then by the time we've finished with them they'd be awesome at it.'<sup>861</sup>

Clearly then, unlike their more professional colleagues, there is an innate awareness amongst reservists of their professional limitations. As the costs of professional failure are not as high as in the regulars, a more conciliatory approach focused on rehabilitation and mentoring is usually followed, in stark contrast to the some elite infantry units.

Taken together, the lack of use of the AGAI system, the different mentality of self-discipline and trust, and the more conciliatory approach to poor performance suggests that discipline in the reserves is different to the regulars. This is perhaps

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<sup>860</sup> Interview 8.

<sup>861</sup> Interview 7.

unsurprising given the former's reliance on social cohesion, and as a result interpersonal bonds likely have greater regulatory power than would be expected in the regulars. But this situation also stands in contrast to discipline in conscript armies, which while they relied heavily on social cohesion, also used the punishment system frequently. Reserve discipline appears to be a hybrid of that discussed in the cohesion literature, blending the new professional paradigm of self-discipline with a reliance on social cohesion's traditional interpersonal relationships for enforcement. Hence the paradox in reserve discipline: On the one hand, the AGAI system is not used as it destroys the social cohesion upon which discipline relies. On the other, it is not needed precisely because social bonds act as a disciplining mechanism when self-discipline has failed. But while FR20 may increase the risk of individual and professional shame through better integration with the regulars, given the distinct nature of reserve discipline, it is unlikely to solve this paradox by 2019. Nor, as the evidence suggests, does it need to.

## **Conclusion**

This chapter examined the nature of sub-unit culture in terms of cohesion, professionalism, and discipline in order to determine the impact of FR20. In logistics units that require collective performance, cohesion remains similar to that in the professional infantry and is based on personal and collective drills. Successful execution engenders successful group performance. In singleton logistics trades, cohesion is viewed in predominantly social terms, distinct from performance. Despite this important distinction between trades, overall it is clear that social cohesion remains central to explanations of why soldiers join, attend training, and remain in the reserves. It also encourages performance. Given that reservists have less time united as a group, social cohesion therefore appears to be more important in the reserves than in the regulars, and it is likely – and indeed wise – for it to remain so. However, its nature is changing as a result of FR20. In the past it was based on alcohol, but the drive for professionalism has

led to the decline of the drinking club. More frequently, collective socialising does not always involve drinking. Conversely, professional cohesion, based on training and courses, is growing. Due to greater exposure to the regulars in training and on operations, the reserves are gradually professionalising by emulating their regular colleagues' culture and attitudes towards competence. This is most obvious in reservists' conceptions of their service as a job, their recognition that operational effectiveness represents the standard at which they should be judged and their widespread acceptance that the regulars have the right to judge them. Their growing sensitivity to individual and collective reputational damage, and their desire for professional status, provide further indicators of the slow percolation of professional culture into the reserves as integration with the regulars continues under FR20. As discussed in the next chapter, it is important for the reserves' long term survival that this occurs by emulation and integration rather than assimilation. Meanwhile, reserve discipline occupies a unique position between the professional and social worlds, reliant as it is on both self-discipline and social bonds. Given the voluntary nature of reserve service, this is unlikely to change anytime soon. The same is true of the social source of cohesion in these sub-units. Nevertheless, FR20 is gradually encouraging a more professional culture in these reserve units. Given the serious issues concerning their ability to deliver the required capability, it may be that this becomes one of FR20's most enduring successes.

Finally, in terms of the transformation literature, this chapter has shown how the Army Reserve's cultural emulation of the regulars has occurred at, and been shaped by, micro-organisational factors. In trying to emulate the regulars' competency-based professionalism, reservists have begun to gradually change their traditional organisational culture and adopt some of the attributes of the regulars that define them at the micro-level. However, the part-time nature of reserve service, the resulting

differences in the locus of cohesion between reservists and regulars, and the nature of singleton logistics trades has limited their ability to fully emulate the regulars. The differences in the associative patterns that generate and sustain cohesion and professionalism between the regulars and the reserves has therefore shown the importance of bottom-up factors in influencing cultural transformation. It seems obvious, but the micro-level organisational reality of different cohesive sources, themselves related to organisational nature, can limit the degree to which military organisations are able to emulate those they wish to.

## Chapter Nine

### FR20, Transformation and Society

This thesis set out to examine the historical, organisational and conceptual origins of FR20; these origins' impact on FR20 on reserve logistics sub-units; and what this outcome tells us about professionalism and cohesion in reserve logistics units and the wider transformation of the Army Reserve. To address the gap in the literature on reserve and logistics forces, I primarily drew on the post-Fordist literature. Within this approach, a number of other literatures and methods were used to examine different aspects relating to FR20. Here, a brief summary is perhaps worthwhile. In the third chapter, I examined the past periods of top-down reserve reform to show how these were cyclically influenced by similar economic, strategic and recruitment factors. These were usually accompanied by politico-ideological arguments to support the organisational changes which followed, while the actual reforms themselves were often hindered and delayed due to stakeholder resistance and organisational frictions in both the army and the reserves. Following Allison and Kaufmann, I therefore argued that transforming the reserves has proven a difficult endeavour historically.

In Chapter Four I examined the origins and evolution of FR20 policy, detailing how it emerged in the backbenches of the Conservative Party and was supported by elites for their own political reasons. These political origins resulted in serious army resistance to the transformation and an opportunistic plan that, despite numerous revisions during the policy formulation process, resulted in an overly ambitious, unplanned, top-down attempt at transformation. However, by including the reserves in the army's deployment schedule, FR20's overarching political *raison d'être* was met;

the survival of the TA was all but guaranteed. Chapter Five provided the post-Fordist organisational context for explaining FR20's impact on reserve logistics sub-units. In doing so, I conceptually contributed to the literature on military logistics by detailing the post-Fordist principles that have informed, and the practices and processes which have shaped, the transformation of US and British military logistics. I argued this post-Fordist transformation has occurred primarily at the strategic and operational management and structural levels, but that tactical logistics practices have also adapted toward a more non-linear logistics system. In doing so, I challenged the classical literature on military logistics for being in many respects out of date. Decisively, I showed how the post-Fordist approach has been absorbed beyond simply military logistics functions to shape wider British and Western force structures and, in their drive for efficiencies, had also increased their potential vulnerability to strategic shocks. Taken together, chapters three to five answered the first part of the inter-related research question.

Ultimately, as Chapter Six discussed, the outsourcing of logistics capabilities usually held in the regulars as a result of Army2020 and FR20 increased the burden on, and created major organisational frictions in, many of the logistics sub-units examined. Some of these had to undergo profound transformation as a result of the new policy, including changing roles and locations, or being formed from scratch. Positive impacts of FR20 were revealed, including the increased availability of professional courses, and greater opportunities to deploy and train with the regulars. But there was also evidence of frustration with the overemphasis on recruiting activity, concerns about recruit quality, and of units being 'forced to play politics' over their recruitment figures. Meanwhile, the post-Fordist centralisation of equipment stores and defence estate rationalisation were found to be negatively impacting reserve training activities. Most importantly, however, combined with poor recruitment figures, given many of the sub-

units' need to re-role and the very heavy re-training burden this created, evidence was provided that many of these sub-units did not believe they could meet the capability required of them under the Army2020 deployment cycle. Thus, extensive organisational frictions were undermining FR20's drive to outsource hard military capability to these units. Chapter Seven undertook the first quantitative cohesion and readiness research in the Army Reserve. Among the logistics component, it found that perceptions of cohesion and readiness were generally positive but had not changed significantly in some sub-units as FR20 progressed. Importantly, there were significantly lower levels of confidence in FR20 increasing their sub-units' capability over time. Conversely, the policy had made progress in increasing reservists' exposure to the regulars. These findings supported the argument that FR20 is failing to deliver hard capability, but is delivering better integration with the regulars in the sub-units examined. Chapters six and seven therefore addressed the second part of the research question.

More broadly, the data in Chapter Seven also indicated that perceptions of social cohesion amongst reserve logisticians were higher than in regular units, who, conversely, had higher task cohesion scores. This supported my arguments in Chapter Eight that the nature of reserve logistics cohesion is different to that of the regular infantry. Indeed, Chapter Eight qualitatively examined the nature of logistics and reserve cohesion using the selected sub-units as an evidential base in order to assess FR20's impact on the cultural-normative aspects of cohesion, professionalism and discipline. At the tactical level, apart from an increased infantry training requirement for logisticians operating on unsecure lines of communication, the post-Fordist logistics was found to have had relatively minor impact on skills to date, but there was an acknowledgement that future technologies could change current structures, specialisms and individual skills considerably. Addressing the recent literature on cohesion, I argued that, like the infantry, collective action provided an important explanation for effective

performance in logistics trades requiring coordinated teamwork, but in other ‘singleton’ trades it appeared that, contrasting King, collective group action is not always critical for successful military performance. This also suggests that classical cohesion – that reliant on interpersonal bonds – was more important in individual trades. Similarly, the evidence suggests that social bonds remain a crucial reason for reservists joining, attending training, and remaining in service, and that reservists classify the nature of their relationships with their comrades in the terms of ‘mates’ and ‘family’. Despite the continued importance of social cohesion, as a result of increased deployments since 2003 and FR20, it is clear that there has been a significant decline in the drinking club and an important rise in professional culture and ethos. This professionalism was acknowledged to emulate, and is closely policed by, the regulars, and was evidenced in the increasing understanding of reserve service as a part-time job where both individual and collective professional status was at stake. As such, FR20 is having a major impact on the professional culture of these units, but perhaps less so on the fundamental nature of their cohesion due to the differing nature of reserve service. Finally, I used this evidence to posit that inherent bottom-up, micro-level factors such as the source of cohesion can limit the ability of military organisations to emulate those they wish to.

However, there are broader conclusions to be drawn from these arguments, and I wish to explore these in the following sections of this conclusion. Firstly, I examine some of the wider organisational impacts of FR20, and what this may mean for reserve service in the future. I also discuss how the army has eventually reconciled a politically-imposed and problematic transformation with the political desire to reinvigorate the Army Reserve. Secondly, I discuss what FR20’s ‘partial transformation’ of logistics sub-units tells us about the transformation literature. I then analyse the experience of FR20 in terms of recent British civil-military relations, before finally drawing some

wider conclusions about FR20 and modern British society. Taken together, chapters eight and nine answer the final part of the research question.

## An Emerging Division

The enduring nature of reserve service has been described as an ‘equilateral triangle’ characterised by commitment to the military, family, and employment by both Carter and Wall.<sup>862</sup> Both are therefore keenly aware of the need to carefully balance these in order to maximise the reserve’s enduring contribution to Britain’s overall military capability. Indicating the importance of this triangle, other research projects are currently examining how reservists balance work and family life and manage identities as a result of FR20.<sup>863</sup> Indeed, Edmunds et al. have already identified the increasing demands of the post-FR20 reserves on its member’s time, labelling it one side of an ‘iron triangle of greedy institutions.’<sup>864</sup> As a result, these authors call for greater support from the military for families and employers in the wake of a more operational role for the Army Reserve. But crucially, they do not discuss the wider impact this integration and operationalisation of the reserves is having within the Army Reserve itself.

In fact, there is evidence to suggest that the greater individual and collective training burden placed on the reserves is altering the nature of service in the Army Reserve itself. This change is being driven by a number of factors related to FR20: the growth of Full-time Reserve Service posts; the opening of regular posts to reservists; the better availability of courses and deployments; and the increased sensitivity to professional status due to integration with the regulars. Complimenting it, and very important in areas of low employment, has been the availability of better monetary rewards for reservists who are not in full-time employment. This greater demand on

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<sup>862</sup> Interview, Wall 10 May 2016; Interview, Carter, 11 May 2016.

<sup>863</sup> ESRC-funded projects, available at <http://www.future-reserves-research.ac.uk/tag/esrc/> retrieved 14 July 2016.

<sup>864</sup> Edmunds et al., ‘Reserve forces and the transformation of British military organisation’, 131.

reservists' time is threatening the equilateral triangle to such a degree that it is challenging the traditional, part-time nature of reserve service. Indeed, this has been identified by reservists themselves:

- R1: 'Most people get [the four weeks needed to undertake driving course] as holiday allowance for the whole year. So how - unless the likes of yourself, as a student - or you're self-employed and you can go, "Ah, fuck it, I'll take three months off and go and do...? [can you do it]"'
- R2: You could smash it and probably have a great laugh with it, whereas if you've got a 9-5 [job], this is pointless.'<sup>865</sup>

This sentiment was frequently repeated:

- R1. 'I would say to anybody thinking of joining reserves, if you're in full-time employment, think about it carefully... Most people get 28 days holiday a year, that's it, and if you do join, you might do it for a year and give up all your time, but then after that, you might start getting a bit tired of giving up every day you have spare to do reserves.'
- Mod: So the demand on your time is quite...
- R2: The biggest thing. And I said, as soon as they turn it to 40 days -
- Mod: If they did.
- R2: - if they did, I'd be going [leaving].'<sup>866</sup>

These quotes highlight the increased burden on reservists' time as a result of FR20, and the limits of their willingness to accept this. Similarly, during the research it became clear that certain reservists, mainly the unemployed and self-employed, are able to commit the most time to the reserves. While this is not new in and of itself, the fact that they were then best positioned to take advantage of FR20's increased opportunities to attend courses and deploy – with the subsequent impact on career progression – was identified as creating a new imbalance in some sub-units between those in civilian employment (and who were the traditional backbone of the TA) and those who are not. Indeed, as a senior NCO in full-time employment elucidated: 'I'm disadvantaged to people that don't work. There's no way I can compete.'<sup>867</sup>

The greater monetary benefits on offer and the impact of the recession further support the evidence of an emerging division between part- and full-time reserve

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<sup>865</sup> Interview 1.

<sup>866</sup> Interview 10.

<sup>867</sup> Interview 11.

service. Indeed, it appears that a core of reservists able to commit more time may be developing. As the reservists below remarked:

- R1: ‘Yeah, it’s always the same people go away.
- R2: It’s always the same ones that go away.
- R3: At the moment I’ve stopped work for a bit so I can actually get my days in. I’ve actually stopped working so I can get my days in.’<sup>868</sup>

Supporting these quotes, numerous sub-unit commanders identified that certain individuals, due to their ability to commit more time, were reaping the benefits of the increased opportunities, at the expense of some of their colleagues who could simply not spare the time to do likewise.<sup>869</sup> There were also reports of part-time reserve officers who had worked for a full month (un-deployed) due to the need for those in command appointments to work more closely with the regulars. Similarly, another reservist reported: ‘We’re getting less and less bounty hunters as well, who just turn up the minimum for the bounty. They’re kind of getting shipped out generally.’<sup>870</sup> Thus, it appears that one of the impacts of FR20 has been to begin to divide the Army Reserve between those who, for primarily reasons of available time, are drawing closer to the regulars and with it increasing their professionalism, and those who cannot. It is perhaps not too much to argue that a split is therefore beginning to occur. While it is certainly true that the reserves have always catered to those with more time commit to service and those with less, it appears this division has been accentuated by FR20’s emphasis on courses and increased capability. Indeed, it is arguable that the reserves are no longer a fully part-time organisation; some elements, especially its officer and SNCO corps, are being drawn into full-time reserve service. In its pursuit of a reserve integrated into the Whole Force, FR20 is thus beginning to challenge the traditional notion of what reserve service means by assimilating elements of the reserves into the regulars. Following King, it is possible to argue that this division is concentrating increasingly

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<sup>868</sup> Interview 10.

<sup>869</sup> Interview 11.

<sup>870</sup> Interview 12.

professional and full-time reservists into a core that is much closer to the army, while the traditional part-timers remain at the periphery. This threatens the traditionally distinctive nature of the reserves as a part-time volunteer organisation and could, conversely pose a threat to its long-term health as an institution. Indeed, there is evidence to suggest that already this is causing friction and some resistance. As one NCO reflected on the traditionally part-time nature of the reserves: ‘We are never going to be the same as them, and we shouldn’t expect to be.’<sup>871</sup> Given the need to maintain the reserves ‘equilateral triangle’, it remains to be seen if this trend is sustainable, and what affect it will have in the long term. Recognising this fact, both Brazier and General Carter are aware of this danger, and have stressed the need for integration over assimilation, thereby recognising both the limits of the Whole Force and the distinctiveness of the reserves. Indeed, there are signs of a move away from other formerly central tenets of FR20.

### **SDSR 2015 and the Divisional Level as an Organisational Solution**

Following Carter’s October 2014 remarks indicating that the Army Reserve’s role was ‘for the worst case’ and that the message to potential recruits and employers would be ‘refined’ as discussed in Chapter Four, in February 2015 he elucidated on his apparent re-appraisal of FR20’s original goals. At a speech at Chatham House, he outlined his position that: ‘the obligation if you join it [The Army Reserve] is for training only... we are not going to use it regularly and routinely, as perhaps was suggested a couple of years ago. Rather, it is there in the event of a national emergency.’ He went on to state: ‘That means it's much more straightforward, I think, for an individual to be a member of the Army Reserve...’<sup>872</sup> At first glance, such a *volte face* represented a complete

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<sup>871</sup> Interview 2.

<sup>872</sup> General Sir Nick Carter, Comments made at Chatham House brief, 17 February 2015, available at [https://www.chathamhouse.org/sites/files/chathamhouse/field/field\\_document/20150217QBritishArmy.pdf](https://www.chathamhouse.org/sites/files/chathamhouse/field/field_document/20150217QBritishArmy.pdf), retrieved 11 May 2016.

reversal of the intended role of the reserves to that envisaged by FR20. Indeed, taking Carter's October 2014 and February 2015 comments together, he appeared to be saying that the Army Reserve's role was much more similar to that of the old TA – a strategic reserve – rather than an operational reserve. This, of course, undermined another central tenet of FR20, and, initially at least, created further confusion as to what exactly FR20 is meant to achieve. Perhaps more significantly, it also seemed to be recognition of the enduring organisational paradox that a more deployable reserve means a less recruited one.

However, the reality is rather more nuanced, and the 2015 SDSR is crucial to understanding Carter's position. Released in October, the 2015 NSS and SDSR differed markedly from its predecessor. Most notably, the threat from international military conflict was prioritised, while instability overseas, public health and natural disasters all moved into the Tier One threat bracket, having previously been Tier Two or unlisted in the 2010 SDSR. Overall, the 2015 SDSR increased the emphasis on the threat of a conventional war with a major power – predominantly in response to Russian aggression in the preceding five years – whilst also stressing the need for increased national resilience. Interestingly, the general erosion of international order and resulting chaos also made a more significant appearance, indicating a realisation that some of the stable planning assumptions underpinning Army2020 had been reconsidered.

The 2015 SDSR committed the army to be capable of quickly deploying a larger expeditionary force of 50,000 (compared with around 30,000 planned in FF2020) by 2025.<sup>873</sup> Crucially, it set out that the army would be expected to deploy a 'war-fighting division optimised for high intensity combat operations.' This division 'will draw on two armoured infantry brigades and two new[ly created] Strike Brigades to deliver a

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<sup>873</sup> *National Security Strategy and Strategic Defence and Security Review*, 29.

deployed division of three brigades'.<sup>874</sup> According to Carter, this top-down strategic re-orientation caused a change in the army's planning assumptions. Decisively, the SDSR's focus on the new quickly-deployable warfighting division meant that the regulars would now provide the majority of its forces. This, of course, has major implications for the Army2020 readiness structure, based as it was on Reactive and Adaptive Forces of integrated regular and reserve components to deliver 'an enduring operation at medium scale in perpetuity'.<sup>875</sup> Moreover, the emphasis on resilience also requires that the regular army 'to be at higher readiness in greater numbers to deliver UK national resilience,' such as flooding relief.<sup>876</sup> While the exact implications of this re-orientation for the Army2020 structure and readiness cycle are still being examined by the army, it is clear that at the highest level the focus on enduring operations and its supporting 'harmony guideline' is being replaced by the need to rapidly deploy greater mass on the battlefield and the principle that the nature of the task should be assessed and then the appropriate tour length and interval determined.

This fundamental shift away from some of Army2020's guiding principles is in its early stages – planning is being undertaken under the banner of 'Army2020 Refine' – but there is evidence to suggest that it will considerably affect the role of the reserves outlined in FR20. According to Carter, the army now intends to restructure the reserve into three echelons organised to support the army's new main goal of war fighting at the divisional level. Crucially, contrasting the regular and routine deployment of reservists, the reserves will now be tasked with providing the basis for reconstitution and regeneration of the regular army within this model, whilst also being available to support the regular's re-organisation for other tasks, such as an enduring operation or

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<sup>874</sup> Ibid, 31.

<sup>875</sup> General Sir Nick Carter, 'Opening Remarks', at RUSI Land Warfare Conference', 28 June 2016, 2, available at [https://rusi.org/sites/default/files/160628-lwc16-cgs-opening\\_keynote\\_jb.pdf](https://rusi.org/sites/default/files/160628-lwc16-cgs-opening_keynote_jb.pdf), retrieved 14 July 2016.

<sup>876</sup> Interview, Carter, 11 May 2016.

national resilience. Similarly, while this new design does not preclude the deployment of formed sub-units and units, it is no longer viewed as essential as under FR20. Instead, the army has committed to routinely offer opportunities for reservists who are available to deploy, either collectively or as individuals, on operations and other tasks, when required. But decisively, according to Carter, reservists' 'can deploy on operations and exercise if they can spare the time, but their minimum obligation is for annual training now,' thereby indicating a major shift in emphasis from FR20 that reflects an acknowledgement of the organisational difficulties of implementing the transformation.<sup>877</sup>

Three major categories of workable roles are now being considered for the reserves to support the regular's re-orientation to the war fighting division. This first category includes specialist units and individuals utilising their civilian skills, such as medical and intelligence experts. The second represents the majority of the Army Reserve and covers generalist combat, combat support, and combat service support units that will be trained collectively to a standard that is achievable from within an average allocation of 40 annual man training days. The last group consists of primarily specialist combat units such as the reserve parachute and special forces units, that due to their ethos and training, are available at higher readiness to deploy collectively. According to Carter, this more bespoke and flexible method of deploying the reserves better reflects the realities of their ability to recruit and train to full strength, and hence their readiness levels: 'It is a more plausible role and a more plausible narrative.'<sup>878</sup> However, in stating that the pattern of reserves deployment will be 'voluntary except at best effort', this indicates that, from an organisational perspective, Army Reserve

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<sup>877</sup> Interview, Carter, 11 May 2016.

<sup>878</sup> Interview, Carter, 11 May 2016.

mobilisation will be a hybrid of that of the traditional TA and that originally envisaged by FR20.

It therefore appears that very recently there has been a concerted move away from Army2020's planning guideline that the reserves would be deployed routinely and regularly at the sub-unit level from roule four of an enduring operation. The fact that these two central tenets of FR20 have been revised indicates that they were not based on the organisational realities of the TA/Army Reserve. It also supports the findings in Chapter Six of the major issues sub-units had recruiting to strength, the availability of equipment to train on, and ultimately delivering the 'hard' capability required of them outlined in Army2020 and FR20. Indeed, it appears that many of these grass-roots organisational issues were repeated across the Army Reserve, and that the high command was well aware of them, often from the outset. Nevertheless, due to the political origins of FR20, and the political appetite at the time to implement it, after first cautioning against the plan, the army's leadership did ultimately make a major effort to effectively implement FR20. In one respect, this recent policy revision therefore represents an acknowledgement that the army was right about the major difficulties associated with creating a more deployable reserve.

There are signs that FR20 has been revised due to other organisational frictions. The most prominent of these is, of course, recruitment. Encouragingly, by December 2016 the Army Reserve's trained strength had markedly improved to 26,300,<sup>879</sup> but again a large proportion of this increase is explained by changes to accounting metrics. In this vein, very recently a new policy of including Phase One-trained (i.e basic trained) soldiers on the total trained strength of the army and the reserves was

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<sup>879</sup> UK Armed Forces Monthly Service Personnel Statistics December 2016, available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/584256/Monthly\\_service\\_personnel\\_statistics\\_-December\\_2016.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/584256/Monthly_service_personnel_statistics_-December_2016.pdf), accessed 9 February 2017.

introduced.<sup>880</sup> In terms of the reserves, this was justified as meeting a recommendation of the EST to rapidly increase trained strengths, and by reference to the fact that reservists and regulars do not need to be trained to Phase Two to conduct numerous national resilience tasks.<sup>881</sup> Nonetheless, as with other changes to recruitment metrics detailed in Chapter Five, while justifiable, such a move also had clear beneficial political and organisational outcomes by increasing the numbers on the books by 2,500. Thus, taken together, around 3,500 out of the reported growth of the Army Reserve is due to changed metrics. Similarly, as identified in Chapter Six, there are also concerns regarding recruit quality. Interestingly, this and the difficulty reaching recruit targets is likely to cause the NAO's recommendation that new entrant recruits for the financial year 2016-17 should total 8,000 be revised downward.<sup>882</sup> In effect, such a revision would represent an acknowledgement that the 30,100 trained strength by 2019 target is unrealistic and may not be achieved. It would appear that another of the major tenets of FR20 has been adjusted due to organisational friction.

A further example concerns budgets. Although FR20 pledged £1.2 billion to reinvigorate the Army Reserve between 2013-23, it is not clear how much of this has been spent to date. Indeed, following the concerns in sub-units that training budgets are being cut identified in Chapter Six, the reserves, as of summer 2016 it appeared that the army is preparing for at least two further years of tight fiscal constraints. While a reduction in training budgets for the reserves can be justified by the argument that the newly integrated reserve force cannot be prioritised over other components of the Whole Force,<sup>883</sup> it does appear to run counter to FR20's pledge to increase investment

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<sup>880</sup> Details available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/537077/20160712-MOD\\_Personnel\\_Statistics-GTS\\_consultation\\_document.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/537077/20160712-MOD_Personnel_Statistics-GTS_consultation_document.pdf), retrieved 21 September 2016.

<sup>881</sup> Interview, Carter, 11 May 2016.

<sup>882</sup> National Audit Office, *Army2020*, 34.

<sup>883</sup> Ibid.

in the reserves, and in collective training in particular. Here it is interesting to note the final analysis of the 2015 EST report:

‘Although not within the reporting period we feel obliged to point to an emergent potential risk to the programme. We are acutely aware of the current tautness the Defence budget, with significant risk in many programmes. Any further budgetary pressure resulting from the 2015 Comprehensive Spending Review, if realised, is likely to have a direct bearing on the Services’ ability to deliver FR20 – whether as a consequence of direct cuts to the programme or indirectly through reductions in activity which exacerbate recruiting and retention risk.’<sup>884</sup>

It appears that these fears were well-founded. While there is no available evidence that these cuts have impacted recruitment yet, conceivably reduced training activity could cause retention problems, especially given FR20’s original commitment to investment and training. Of course, as the EST’s conclusion highlights, the blame for this can hardly be put on the army. But the fact that the army is confident enough to justify cutting the reserve budget hints that practical considerations may finally be trumping political ones, which in turn highlights the decreased political attention on the issue. Indeed, it is perhaps noteworthy that after the fall of the Cameron government in June 2016, Brazier resigned as reserve minister in July.

However, it is important to stress that these recent revisions do not mean FR20 has been abandoned. Far from it. Despite the need to ‘manage resources efficiently’ across the Whole Force, transformation of the Army Reserves is continuing with strong emphasis on collective training and opportunities to train and deploy with the regulars.<sup>885</sup> The system of pairing units – the army’s own practical solution to increasing reserve capability – remains crucially important to both the regulars and the reserves and a central part of reserves policy. Complimenting the evidence from logistics units on the increased availability of deployments, reserve combat and non-

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<sup>884</sup> National Audit Office (2015) *Reserve Forces External Scrutiny Team Annual Report*, 3, London: NAO, available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/447168/20150622-FR20\\_EST-Report-2015-Final.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/447168/20150622-FR20_EST-Report-2015-Final.pdf), retrieved 14 July 2016.

<sup>885</sup> Interview, Carter, 11 May 2016.

combat forces are being deployed much more frequently in the past, predominantly in lower threat environments. For example, reserve infantry platoons and company groups have deployed to Cyprus, the Falklands and Ukraine recently, indicating the army's commitment to offering opportunities and deploying the reserves post-FR20. Moreover, reservists in a REME sub-unit reported the availability of training deployments to Cyprus, Germany and Canada in a 12-month period, with three opportunities to deploy to the latter.<sup>886</sup> This marks a major change from the opportunity to deploy in the TA. Crucially, these deployments provide a means by which reserve professional standards should gradually increase, itself conducive to better mutual understanding and, ultimately, the respect of the regulars. This workable method of better integrating the reserves is also being complimented by other efforts that support FR20's political aim to reinvigorate the force and ensure its organisational survival by making it more capable. For example, young officer training has been made more flexible to better fit reservist circumstances, and new career paths that allow them to serve at regimental duty and on staffs introduced. Similarly, training for all ranks is being made more modular to fit the unique position of reservists.<sup>887</sup> Combined with these reforms, efforts to open up the coveted command appointments in regular units to reservists are being made, indicating a step-change in how the regular high command view the best reservists' contribution. Other measures are being made to introduce career management models that better reflect the realities of reserve service. Another signal of intent is the appointment of a reservist Major General to the Executive Committee of the Army Board, giving the reserve component more clout in terms of recognition, resourcing and policy making. Both Carter and Brazier have stressed that the ultimate health of the Army Reserve will be determined by the re-establishment of a well-recruited, trained and vibrant officer corps. Taken together, these changes indicate that, supporting the findings in Chapter

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<sup>886</sup> Interview 12.

<sup>887</sup> Interview, Carter, 11 May 2016.

Eight, some of FR20's most enduring successes will likely be in steadily changing the relationship between the reserves and the regulars, and with it the slow inculcation in the reserves of a more professional ethos based around that of the regulars but irrespective of the distinctions between the two. These cultural changes will likely to continue to be less obvious than the hard capabilities that the reserves were originally forecast to provide, but over time they may be equally as important. Nevertheless, apart from perhaps in the category three roles defined above, social cohesion is likely remain more important in the reserves due to the different nature of its service and the fact that many explicitly join to experience the comradeship traditionally associated with army service.

Given the political battles surrounding its origins, and the criticism FR20 has received from numerous quarters, for his part Carter has understandably presented this revision of FR20 as primarily caused by the changed demands the 2015 SDSR placed upon the army, and in particular the re-emergence of the war fighting division. In the context of chapters two and three respectively, this position can be seen as emphasising the strategic rationale for organisational reform. There is also an acknowledgement at the top of the army that the inability to recruit to strength was threatening the delivery of reserve capability to Army2020's roule four and beyond, thereby threatening the overall sustainability of the model. Problems delivering collective reserve capability compounded this, whilst paradoxically, the requirement to deploy collectively and more often increased the training burden on reservists and threatened to upset the balance between their service, employment and their families. Just as in the previous periods of reserve reform, major organisational challenges, many rooted in the very nature of reserve service itself, not only prevented FR20 from reaching two of its primary goals, but these goals in and of themselves in turn threatened the overall sustainability of reserve service. Due to these organisational difficulties, and more importantly, the

political sensitivity and media interest surrounding FR20's success, the new emphasis on the centrality of the war fighting division and its implications for Army2020 is fully understandable. But it may only partially explain the recent revision of the reserves policy.

Unlike its predecessor, the most recent SDSR has been widely praised as a comparably strategically sound document that seeks to align ends, ways, and means.<sup>888</sup> However, while the Army Reserve issue is very unlikely to have influenced the increased emphasis on major conventional conflict outlined in the SDSR (this was based on the National Security Risk Assessment), it is possible to argue that the change in emphasis that accompanied it presented the army with a relatively fortuitous opportunity to address the major organisational problems FR20 had created. Indeed, given the political infighting and recurring organisational frictions that FR20 had caused, the 2015 SDSR's emphasis on the warfighting division offered the army an organisational solution by which to extricate itself from the transformation's most ambitious – and clearly unworkable – elements. Most importantly, this solution was based on strategic rationale and provided a perfectly justifiable narrative given the changes occurring to the army's role and structure. Crucially, the timing and content of Carter's February 2015 speech, in which he spoke first of the need to fight at the divisional level and then directly followed this with his thoughts on the changed role for reservists, hints that this organisational solution may have been understood during SDSR's planning phase. That is not to suggest that the army's emphasis on the division was specifically designed in order to organisationally extricate itself from the failing elements of FR20 – it clearly wasn't. Edmunds has detailed the transnational nature of

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<sup>888</sup> International Institute for Strategic Studies (2015) 'UK augments military and counter-terrorism capacities' available at <http://www.iiss.org/en/publications/strategic%20comments/sections/2015-1f4d/uk-sdsr-e7a2>; *The Daily Telegraph* (23 November 2015) 'SDSR: Lord Dannatt's reaction', available at <http://www.telegraph.co.uk/news/uknews/defence/12012537/SDSR-Lord-Dannatts-reaction.html>, both retrieved 16 May 2016.

British defence, and with the centrality of divisional level operations being adopted in the US for similar strategic reasons, Britain knew it would need to follow suit to retain both political clout and interoperability,<sup>889</sup> but there was arguably an awareness within the army of the political and organisational benefits that such a change in its operational posture would have on FR20. This is likely to have been complimented by the growing doubt that the Army Reserve could contribute the required capability to the later roules of a deployment. By June 2016, in his first public announcement that the rationale underpinning FR20 had changed, Carter stated that ‘one of the advantages of these new Defence Planning Assumptions [DPA] is it allows us to think more from first principles about what the role of the Army Reserve should be.’<sup>890</sup> He went on to clarify:

‘You recall that a year ago, given the [DPA], it [the Army Reserves] was there very much to backfill and integrate a regular structure which was designed to manage [an] enduring operation in perpetuity. Now it is there for reconstitution and regeneration. It is there in the event of a nationally recognised emergency. Now that’s not to say that the reservists are not able to take their part if they can afford the time and effort to be able to deploy alongside the regular components, but they are there in true obligation terms for the worst case. Now that is proving to be easier to recruit for.’<sup>891</sup>

Carter’s final sentence is particularly interesting. It is therefore not too much to suggest that the SDSR, perhaps more by implication rather than design, presented a solution to the major organisational frictions FR20 had caused the reserves by calling for their regular and routine deployment at the sub-unit level. SDSR 2015, and the rapidly deployable warfighting division it called for, has allowed the army to extricate itself from the most problematic parts of FR20. Crucially, given its political origins, it has allowed this occur with little fanfare or political cost and has and is being explained by an altered narrative that can be justified by changed strategic circumstance.

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<sup>889</sup> Edmunds, T. (2010) ‘The Defence Dilemma in Britain’, *International Affairs*, 86(2); King, A. (Forthcoming) *Divisional Command*.

<sup>890</sup> Carter, ‘Opening Remarks’, 3.

<sup>891</sup> Ibid.

Indeed, following this argument and building on that in chapters four and five, it appears that less than two years after it was unveiled, in 2015 another key moment in FR20's evolution had occurred. This evolution was again heavily influenced by strategy, recruitment and organisational friction; the SDSR's new vision for the deploying an army division provided a relatively unique chance to solve FR20's organisational shortcomings. The content and timing of Carter's February 2015 Chatham House speech indicates that the two issues had been linked at this time. Similarly, the timing of Carter's October 2014 remarks on the 'refinement' of the message to reservists about their regular and routine deployment, appears significant for three reasons. Firstly, coming soon after he had become CGS, and hence untainted by previous allegations made against the army's senior leadership of wanting FR20 to fail for their own organisational survival reasons, Carter's remarks can be seen as highlighting that a politically neutral re-appraisal of FR20 indicated it was failing in some critical areas. Secondly, his October 2014 remarks were likely something of a political litmus test, allowing Carter to gauge senior political commitment to FR20. Thirdly, and most importantly, this public re-appraisal was supported by practical facts, in particular coming just before new figures would once again highlight an inability to recruit to strength, thereby seriously undermining FR20's main goal of increasing reserve deployability and highlighting the need to keep 'balance' in the reserves.<sup>892</sup> This is likely to have been complimented by further indications coming up the chain of command of the organisational frictions caused by the focus on recruitment activity and re-roling at the sub-unit level. Thus, the reserves recruitment issue was constraining its ability to provide the organisational output required by Army2020's deployment cycle, and thereby threatening the overall coherence of the plan. Mirroring the lessons of the

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<sup>892</sup> Carter, Comments made at Chatham House brief.

past, recruitment and other organisational issues interacted with strategic considerations to shape the transformation of the reserves at this moment.

Moreover, as with the past periods of reform, while the issues influencing the direction of the reserves have been remarkably constant, the organisational solutions adopted to address them have been a product of their own time. The importance of the 2015 SDSR and the re-emergence of the warfighting division supports this argument. Similarly, without the major political input and the context of organisational survival that shaped FR20, it is arguable that in the most recent revision of the transformation, senior leaders within the army had much more scope to alter course. It appears that another key moment in the evolution of the reserves has occurred, one that has returned its operational role to much closer to that of TA than originally envisaged, but with a much higher degree of integration with the regulars. This arguably reflects a much more realistic assessment of the Army Reserve's organisational nature and what it can realistically provide in terms of capability. It also indicates an awareness that the fundamentally political goal of arresting the neglect of the reserves has been met, and that a differentiation between the need for this and the problems associated with outsourcing operational capability to the reserves was due.

Finally, the re-emergence of the warfighting division has interesting implications for the future of the post-Fordist approach to military organisation. Indeed, given the similar changes afoot in the US, it suggests that mass is seen as increasingly important to future military operations. It also indicates a realisation of the limits of the effectiveness (and indeed long term efficiency) of outsourcing to the reserves, and a desire to maintain core capabilities within a larger regular army formation whose primary role will be fighting conventional or near conventional wars. Interestingly, this re-orientation of the army under Carter to an emphasis on mass provides evidence of a

tacit awareness of the limits of the ‘Total Cost’ Whole Force approach to organising military forces. While it would be wrong to suggest that the re-emergence of the war fighting division means an end to the four processes of post-Fordist military organisation – it clearly doesn’t – what it does provide is further evidence of the army’s realisation that the stable assumptions underpinning rotational readiness and deployment structures are not best designed to address strategic shocks. The growing risk of a major conventional war, other strategic shocks, and even the decline of international order into chaos, requires both greater mass and organisational flexibility. Changing perceptions of the nature and scope of threat have driven this return to the rapidly deployable division, but it may also mark the start of a re-assessment of the post-Fordist military processes and structures that have delivered efficiencies but simultaneously reduced strategic flexibility. Indeed, Carter’s statement that the reserves’ primary role has returned to providing a strategic reserve for ‘a national emergency’ echoes Lamb’s about the reserves’ real utility in providing cheap, scalable mass in such an event. Nevertheless, as Chapter Four showed, in the longer-term, removing the reserves from the army’s readiness cycle could make them more vulnerable to defence cuts again should the political winds change.

### **FR20 as a Transformation?**

The centrality of FR20’s original goal of the transformation of the reserves is difficult to deny. The Independent Commission submitted its proposals under the banner of ‘transforming the reserves’ and mentioned reserve transformation a further eight times, calling for a ‘reinvigorated Reserve transformed into an integral component of the Whole Force.’<sup>893</sup> Although he had referred to reserve transformation numerous times

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<sup>893</sup> *The Independent Commission*, 38.

during the consultation process,<sup>894</sup> when introducing FR20 in July 2013, Hammond – likely cautious about over promising and under-delivering – stated that the new policy aimed to ‘revitalise’ reserve forces rather than explicitly transform them, it will be remembered from Chapter One that the document itself clearly stated that ‘FR20 is part of the wider Transforming Defence campaign that is aiming to transform our Armed Forces and deliver Future Force 2020.’<sup>895</sup> It also specifically mentioned reserve transformation a further three times. Clearly, the army and the wider defence establishment viewed FR20 as a transformative process.<sup>896</sup>

The question is then, has FR20 transformed, or is it transforming, the reserves? Of course, much depends on the definition of transformation. As Foley et al. have argued, military transformation is in fact simply another name for innovation.<sup>897</sup> Farrell has also distinguished between top-down innovation – a ‘major change that is institutionalised in new doctrine, a new organisational structure and/or new technology’ – and bottom-up adaption undertaken in response to operational pressures.<sup>898</sup> It will be remembered that Grissom has argued that for an innovation to be recognised in the academic literature it has to have met three criteria. Firstly, ‘an innovation changes the manner in which formations functions in the field’; i.e their operational praxis. Secondly, the innovation must be significant in scope and impact, a definition that Grissom recognises implies a consequentialist understanding. Finally, ‘innovation is tacitly equated with greater military effectiveness.’<sup>899</sup> FR20’s original goal of creating a better trained and equipped Army Reserve, held at higher readiness deploying routinely

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<sup>894</sup> ‘Consultation launched on the future of Britain’s Reserve Forces’ available at <https://www.gov.uk/government/news/consultation-launched-on-the-future-of-britains-reserve-forces>, retrieved 28 July 2016.

<sup>895</sup> *Future Reserves 2020*, 59.

<sup>896</sup> *Transforming the British Army; Transforming the British Army: An Update*.

<sup>897</sup> Foley et al., 253.

<sup>898</sup> Farrell, and Terriff, *The Sources of Military Change*, 6; Farrell, ‘Improving in War: Military Adaptation and the British in Helmand Province, Afghanistan’, 570.

<sup>899</sup> Grissom, ‘The future of military innovation studies’, 907.

at the unit and sub-unit level, in order to increase the army's capability, appears to meet all three of these criteria. The unit and sub-unit aims sought to change the way the TA had predominantly been used in the field. FR20 itself stated that so profound was the cumulative effect of this policy in terms of scope and impact that it represented a transformation. And tying the more deployable reserve into the Army2020 readiness cycle was designed to increase overall military effectiveness and efficiency. FR20 was therefore clearly a transformative attempt to turn the Army Reserve into an operational rather than a strategic reserve. So has it succeeded?

Most of the top-down transformation literature is based on archival research of past periods of military change. It is therefore important to note that FR20 is still ongoing and that I have used predominantly recent and current data to examine the policy. There is potential for its trajectory to change again. Nevertheless, this research has revealed that the central tenets of FR20 have been revised downwards since the policy was introduced. Most importantly, there has been a major revision of the reserves role detailed in FR20. The routine and regular deployment of reservists on operations is not going to happen. Instead they will be used for a 'worst-case' scenario. As such, the fully operational role of the reserves has been modified; although likely to be more capable, overall, the model of reserve deployment on operations will remain closer to the strategic reserve role of the TA. Similarly, there has been a less obvious but equally profound move away from the deployment of reserve sub-unit and unit formations. This has been driven in part by the organisational reality that many reserve sub-units could not have provided the required capability in perpetuity anyway. As I have shown, this bottom-up resistance in turn undermined the overall coherence of Army2020's rotational deployment plan, adding another reason for a revision of reserves policy. The effect of a reduced reserves training budget in the years up to the end of FR20 has

compounded this. Indeed, given these recent revisions, it seems clear that there will not be a major pan-organisational change in how the Army Reserve is used in the field.

The evidence is perhaps less clear concerning the scope and impact of FR20. On the one hand, despite major investments in training, recruitment and equipment, closer integration with the regulars, and many more opportunities for reservists, the requirement for the majority of the Army Reserve to contribute to the army's operational effectiveness in the manner FR20 detailed is not being pursued. On the other hand, these factors are contributing to significant changes within the Army Reserve that could increase its military effectiveness in the long term. Following Kier and Farrell, perhaps the most important of these changes have been cultural-normative, with a greater sense of professional ethos and professional pride emerging that emulates that of the regulars. This is supported by the decline of the importance of the traditional drinking club and an increasing perception of reserve service as a 'job'. Through its continued commitment to pairing and integration with the regulars, and greater availability of courses and deployments, this cultural shift is likely to maintain momentum, in the short-medium term at least. Despite the political de-investment at the top level of government (which is likely to continue under Theresa May's premiership), for the moment it is clear that the army remains committed to revitalising the reserves. Therefore, it is possible to argue that a major cultural change is underway in the Army Reserve, and that by encouraging professional standards, this is gradually affecting the operational praxis of the organisation as a whole. While the wider impact of professional values is different to the cultural emulations discussed in the innovation literature, King and others have already argued it to be central to the recent transformation of Western European armed forces' effectiveness and that of the combat

infantry in particular.<sup>900</sup> As I have shown, given the distinct organisational nature of the reserves, and the fact that reserve cohesion is still based on social bonds, inherent bottom-up, micro-level factors can limit the ability of military organisations to emulate those they wish to. Thus transformation is likely to take longer in the reserves and may not be implemented as fully, but nevertheless it should ultimately increase its military effectiveness. It appears that one of the criteria for military innovation has indeed been met. FR20 has been a partially successful transformation.

What does this partial success tell us about the academic literature on transformation? Most obviously, this study has addressed a major gap in the innovation literature by examining reserve, and non-combat, forces for the first time. It has also utilised the wider sociological literature on post-Fordism, professionalism and cohesion to more deeply understand the nature of the transformative processes at play than in the transformation literature. This approach has revealed that, as might be expected given the traditionally part-time nature of reserve forces and these organisation's more limited ability to demand its members' time, there are often more deeply ingrained organisational factors resisting change than in regular forces. In the case of the Army Reserve, some of these are related to the organisational paradoxes identified in the TA by Walker, and more recently articulated by reference to the 'equilateral triangle' by Wall and Carter. For example, the fact that increased training and deployment demands can negatively impact reserve turnout, recruitment, and retention, delineates a major difference with the regulars. Moreover, as reserve officers and indeed SNCOs are generally less experienced, and have less time for management and administration tasks, both top-down and bottom-up transformative processes take longer to effect change. Supporting Chapter Three, the nature of reserve organisation and service therefore in and of itself makes transformation inherently more difficult than in regular forces.

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<sup>900</sup> King, *The Transformation of Europe's Armed Forces*; King, *The Combat Soldier*.

This study also contrasts the consequentialist, even positivist, nature of the majority the military transformation literature. It helps reverse that trend by examining an uncompleted transformation, and how external top-down political direction failed to produce the organisational changes originally envisaged. As I have shown, political elites' plans for the reserves were not grounded in organisational reality but in intra-party politics. The real impetus behind FR20 came from relatively junior politicians with considerable leverage over a new and weak Prime Minister, who were equipped with an admirably strong desire to end the neglect of the reserves that they perceived would continue if left to the army's high command. However, these intensely political origins also resulted in the army's initial strong resistance to FR20. Most crucially, as I and official reports have shown, the cumulative effect of these origins resulted in an initially ad hoc and poorly modelled plan far removed from the organisational realities of the Army Reserve. FR20 was therefore adjusted at each step in its development due to army resistance and organisational friction in the reserve. Once implemented, these frictions ultimately undermined attempts to transform the reserve into an operational force. Bottom-up resistance therefore severely limited the impact of central tenets of FR20. Complimenting both Catignani's and Harkness and Kunzerb's works, the case of FR20 and the Army Reserves shows how low-level organisational resistance can curtail top-down politically-imposed innovation. It also neatly supports Allison and Kaufman's arguments that broader institutional change is driven by elites, revised by stakeholder resistance and organisational friction, and ultimately results in a re-booted version of the organisation. Indeed, this perfectly surmises the origins, evolution and impact of FR20.

### **FR20 and Civil-Military Relations**

The story of FR20 also raises interesting implications about British civil-military relations during this period, which are worthy of brief discussion here. In *The Soldier and the State*, Huntington described and indeed called for the objective civilian control

of the military as the most effective way of maintaining the armed forces' capability whilst remaining relatively de-politicised from party agendas. For Huntington, professional military service should be removed from politics and subservient to the state.<sup>901</sup> In return for this, government should not interfere in military matters.<sup>902</sup> However, Janowitz outlined a more subjective model of civil-military relations based on his view that the large technocratic and bureaucratic US military of the 1950s increasingly resembled a modern civilian corporation. As a result, he argued that the military was coming under increasing subjective control as it became more reflective of civilian society as a whole; it therefore needed to be close to government, politics and society to reflect it.<sup>903</sup> Much more recently, Peter Feaver has convincingly argued that civil-military relations in fact resemble a principal agent theory 'game' of strategic interaction between civilian leaders and military agents. In this model, civilian leadership controls the military through monitoring and punishment, and the military can either 'work or shirk' based on its expectations of punishment.<sup>904</sup> Regarding British civil-military relations, Egnell has argued political control is highly centralised, enabling political control of the military to be conducted with low political costs. Because of this 'low cost of monitoring' the armed forces, military officers, if mindful of their careers, have always had to stay in tune with the wishes of the political leaders.<sup>905</sup> For this reason, Egnell argues that British civil-military relations more closely resemble the 'Janowitzian' model. Edmunds has also noted the complexity of British defence policy space, with deep inter- and intra-service divisions over the role

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<sup>901</sup> Huntington, *The Soldier and the State*, 79, 466.

<sup>902</sup> Ibid, 83.

<sup>903</sup> Janowitz, *The Professional Soldier*, 420.

<sup>904</sup> Feaver, P. (2003) *Armed Servants: Agency, Oversight, and Civil-Military Relations*, Cambridge, MA: Harvard University Press.

<sup>905</sup> Egnell, R. (2006) 'Explaining US and British Performance in Complex Expeditionary Operations: The Civil-Military Dimension, *Journal of Strategic Studies*, 29(6).

and resourcing of the armed forces and the wider impact of political and economic interests.<sup>906</sup>

The political origins of FR20 and the army leadership's initial reluctance to instigate the reforms supports Egnell's view that British civil-military relations are closer to Janowitz's model than Huntington's. Senior and even junior politicians were closely involved in shaping and directing the new reserve policy, often against the wishes of the army, who themselves at times were willing to attempt to mobilise public support for their position through comments and leaked reports to the media. Thus, far from being detached from politics, the army's leadership was aware of the need to be politically savvy in their arguments and narratives to ensure their organisation's survival. Clearly, both Dannatt and Wall had major disagreements with their political masters in the defence ministry and wider government over the cuts to the army and the reserve plan in particular, indicating the willingness at the top of the army to 'stand-up' for its interests against politicians intent on overstretching the army in Iraq and Afghanistan, and reducing its size and capability in the drive for efficiencies, respectively.

Indeed, the case of Dannatt is of particular interest as it was widely acknowledged that his poor relationship with Labour Prime Ministers Tony Blair and Gordon Brown, and the frankness with which he articulated the army's interests *vis a vis* government policy during the Iraq and Afghanistan wars, ultimately cost him promotion to CDS.<sup>907</sup> The Labour Government clearly viewed Dannatt as too political. Such an outcome, and the fact that some in the MoD later believed that the army's senior leadership wanted FR20 to fail, supports Feaver's view of the principle agent

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<sup>906</sup> Edmunds, 'The Defence Dilemma in Britain', 382-88.

<sup>907</sup> *The Daily Telegraph*, (17 July 2009) 'General Sir Richard Dannatt: profile', available at <http://www.telegraph.co.uk/news/uknews/defence/5850490/General-Sir-Richard-Dannatt-profile.html> retrieved 23 May 2016.

‘game’ where both sides have leverage over the other in terms of determining careers and supporting policies. Indeed, it is interesting to note that Haughton, a supporter of FR20, was later somewhat surprisingly appointed CDS having not led his service, as is tradition. Similarly, as the principal architect of Army2020, Carter would have done his chances of promotion no harm either. Within this ‘game’ context, the role of personality in British civil-military relations appears important, given the small size of senior circles in the defence community. Following the poor relations Dannatt had with the Labour government, his successor, Richards, and Brown were keen to cultivate better relations after his departure.<sup>908</sup> While intrinsic personalities are clearly important, a change of personnel at senior level also often provides an opportunity for one or both sides of the British civil-military divide to re-assess their relationship and address them.

While not explicitly about British civil-military relations, *Blair’s Generals* provided an interesting insight into the nature of predominantly army-government relations during and after Blair’s premiership. Numerous generals, including Lamb, outlined that the lack of ability of government to clearly articulate its strategy undermined the effectiveness of operations in Iraq and Afghanistan.<sup>909</sup> Meanwhile, Geraint Hughes has noted Blair’s interventionist belief that the UK had the manpower and resources to act as a global police force alongside the US was ‘absurdly grandiose’.<sup>910</sup> There was therefore a failure to politically support operations with a coherent and achievable strategic vision and the resources to enable this.<sup>911</sup> Despite the strains that these operations put upon the relationship between the army’s leading generals and the rest of government during this period, Lamb, and Strachan, have

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<sup>908</sup> Richards, *Taking Command*, 297.

<sup>909</sup> Lieutenant General Graeme Lamb (Ret.), ‘On generals and generalship’, in Bailey, Iron, and Strachan, *British Generals in Blair’s Wars*.

<sup>910</sup> Hughes, G. (2013) ‘British Generals in Blair’s Wars: A Review Article’, *The Round Table*, 102(6).

<sup>911</sup> Cawkwell, C. (2015) *UK Communication Strategies for Afghanistan, 2001-2014*, Ashgate: Farnham.

commented upon the lack of resignations amongst the former.<sup>912</sup> For organisational, professional, and personal reasons generals remained in post. Similarly, former MoD senior civil servant Desmond Bowen noted how the relationship between ministers and generals was an unbalanced one, with the latter clearly subject matter experts ‘not beyond threatening that they will expose the fact that military advice is turned down, if that course is not accepted.’<sup>913</sup> Clearly then, both generals and politicians were capable of playing politics. The evidence presented in *Blair’s Wars* therefore further supports both Feaver’s principle agent ‘game’ model and Egnell’s argument that British civil-military relations follow the Janowitzian model with closely integrated military bureaucracies competing with other government entities in ways that mirror civilian society.

Nevertheless, in as much as it directly addresses British civil-military relations, the context for *Blair’s Wars* is a sustained period of warfighting and stabilisation operations. As I have shown, the drive for peacetime efficiencies and the government’s political desire to reinvigorate the Army Reserve and integrate it into the army’s deployment schedule also caused major strains between politicians and army generals. These were based on peacetime issues of global strategic vision, force structures, funding, and the organisational realities of transforming the reserves, rather than operational pressures. Crucially, the trend of strained army-government relations continued under the Conservative government; only once Carter became CGS was there an apparent reversal, supporting my argument about the importance of both personality and personnel change in recent British civil-military relations. Indeed, despite the traditional view that the Conservative Party is more favourable to the military and ‘strong on defence’, primarily due to its political ideology concerning state spending, it

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<sup>912</sup> Strachan H. ‘Conclusion’; Lamb ‘On generals and generalship’, 153-156, in *British Generals in Blair’s Wars*.

<sup>913</sup> Bowen, ‘Political–military relations’, *British Generals in Blair’s Wars*, 277–278.

has overseen the reduction of the British Army to its smallest size since the Battle of Waterloo. While size is not in and of itself an indicator of military capability, the fact that the most effective army in the world, the US Army, and its British counterpart, has recently re-discovered the importance of mass indicates that this may not have been the wisest, or most cost-effective, policy in the longer-term.

Finally, what can the army learn from the experience of FR20? This is a question that numerous senior officers asked during the research. On the one hand, the army's senior leadership is legally and morally bound to take the direction of its political masters, even if the policy that follows this direction is flawed in places. In reality, senior officers have only two options when faced with such direction, either implement the policy (wholeheartedly or less so) or resign. In *Blair's Wars* Lamb denounced the failure of generals who had been found wanting on operations in Iraq to resign.<sup>914</sup> While the situation concerning FR20 was different in that the operational competence of generals was not being tested, it is noticeable that while numerous senior officers resigned over the cuts to the army which underpinned FR20, no head of service did so.<sup>915</sup> This raises the question of the politicisation of the most senior appointments within the British defence establishment. Dannatt was accused of 'playing politics' during his tenure as CGS, while similar accusations were made against Wall and some of his team in the army in terms of wanting and allowing FR20 to fail. Of course, resigning at the pinnacle of a 30-year career is a difficult decision not to be taken lightly. But by not resigning over points of policy they strongly view as detrimental to their respective organisations, and indeed national interest, service chiefs essentially

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<sup>914</sup> Lamb, 'On generals and generalship', 146.

<sup>915</sup> *The Daily Telegraph*, (30 June 2012) 'Army's most senior female officer quits amid cuts anger', available at <http://www.telegraph.co.uk/news/uknews/defence/9366975/Armys-most-senior-female-officer-quits-amid-cuts-anger.html>; *The Daily Telegraph*, (2 July 2012) 'At least six 'talented' generals quit Army over defence cuts', available at <http://www.telegraph.co.uk/news/uknews/defence/9368608/At-least-six-talented-generals-quit-Army-over-defence-cuts.html>, both retrieved 7 September 2016.

passed responsibility for delivering flawed programmes down the chain of command. As this research has shown, this has forced some sub-units to play politics themselves, increasing politicisation at lower organisational levels, a development that most appear uncomfortable about. However, more junior officers have less agency to reject such policies already accepted by the army as their careers depend on delivering the mission set for them by the chain of command. Numerous interviewees cited that one impact of FR20 has been to increase inherent tensions between sub-units who remain dubious about some of the changes, and higher commands that are responsible for implementing them. Indeed, one question the army asked to be included in the group interviews was the degree to which sub-unit personnel trusted the army's senior leadership in respect to FR20, indicating their awareness of the problem. As such, the failure to reject poor policy at the top can result in greater politicisation and organisational friction down the chain of command. While service chiefs no doubt find themselves in a difficult position due to the political consequences of resigning, in order to ultimately protect the organisation from flawed policies, and highlight their inadequacies (not to mention the strong convictions of the chiefs which would likely win respect through the chain of command) perhaps this action could be taken more frequently. It is very interesting to note that while a number of army chiefs have been replaced, only one has resigned; Sir John French in 1914, as a result of the Curragh mutiny. As such there is a culture in Britain of army chiefs continuing to serve despite major disputes with their political masters. This has become increasingly prominent since the defence cuts of 2010 and the release of the Chilcot report in July 2016. While this culture is embodied by an awareness that high rank bears a responsibility to the political system and to the nation (and can also be justified by the fact that changes would be pushed through by a successor anyway), as this research has identified, such a culture is also clearly not without its risks. Similarly, given its rarity, any chief's resignation could have a major

impact on civil-military relations in the wake of their departure. Nevertheless, the lack of resignations suggests an unwillingness at the highest levels of the army's leadership to take a career-ending stand over politically-imposed policies, parts of which were known to be unworkable.

There are other, less drastic lessons the army can learn. One major lesson is that the TA and Army Reserve have drawn, and will continue to draw on, strong political support external to, and at times in spite of, the regulars. The lesson of history is that the army therefore prioritises itself and neglects its reserve to its longer-term peril. Understanding the political importance of a capable army reserve should be central to future senior commanders, and would be ultimately beneficial to the regulars, reservists and wider British civil-military relations. Conversely, if service chiefs are going to play politics, they may need to get better at it. Another failing concerns the messaging behind FR20. As this research has shown, the cutting of the army and the growth of the reserves were fused in an ad hoc fashion under Fox. Indeed, Fox himself was later a strong advocate for not cutting the army until the reserves were fully manned. But allowing the revitalisation of the reserves to be portrayed as simultaneous compensation for a vastly reduced army strength represented another mistake by military leaders, and indeed their political masters. As Carter has noted 'it is disappointing that the recent debate about the importance of the Army Reserve has too often been confused by the conflation of the regular army and the growth in the Army Reserve'.<sup>916</sup> In future, more careful coordination of transformative processes, and the messaging accompanying these, would be beneficial to both the regulars and the reserves.

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<sup>916</sup> Carter, General Sir N. (2014) 'Army2020 The Army Reserve', *Army Reserve Quarterly*, Autumn, 12 available at [http://www.army.mod.uk/documents/general/ADR004124\\_ARQ\\_Autumn\\_2014\\_web.pdf](http://www.army.mod.uk/documents/general/ADR004124_ARQ_Autumn_2014_web.pdf), retrieved 9 September 2016.

## **FR20 and Society**

That FR20 aimed for a transformation of the reserves has been proven. But it has perhaps been forgotten too easily that it also aimed for a transformation of British society. Unveiling FR20, Hammond announced that ‘Above all we [the government] seek a new relationship with society.’<sup>917</sup> Although all mention of ‘Big Society’ had been dropped since appearing in the Independent Commission, FR20 was replete with references to its attempt to change British society’s attitude to reserve service. Across its pages, it spoke of ‘harnessing the volunteer ethos of society to tap into the best talent the country has to offer’ whilst arguing that ‘greater reliance on the Reserves is more cost-effective for the nation’ but also requires ‘a greater willingness by society as a whole to support and encourage reserve service.’<sup>918</sup> Decisively, it stated: ‘What we are asking is significant and it will require a cultural shift both in society as a whole and within the Armed Forces. This won’t happen overnight; it will take time to achieve.’<sup>919</sup> Clearly, FR20 aimed to transform of the nature of society’s relationship with the reserve.

In terms of the British military, FR20 indicated a departure from the focus on the core professional force that had become one of the most defining characteristics of the British Army. The nature of this shift had previously been heralded in *The Times*, where, under a headline announcing “The day of the ‘citizen soldier’ has arrived”, Wall noted that Britain had depended on the commitment of its citizen soldiers ‘for generations’ and called for society to support the growth of the reserves.<sup>920</sup> Interestingly, however, Wall’s use of the term distorted the original meaning of citizen-soldier. Cohen has defined this as the distinctive motivations of soldiers, their

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<sup>917</sup> *Future Reserves 2020*, 7.

<sup>918</sup> *Ibid*, 10, 8, 13.

<sup>919</sup> *Future Reserves 2020*, 9.

<sup>920</sup> *The Times*, (24 February 2012) General Sir Peter Wall: ‘The day of the ‘citizen soldier’ has arrived’.

representativeness of wider society, and their primarily civilian identity in the conscript US military of the ‘Great[est] Generation’. In contrast, their professional successors are volunteers, increasingly unrepresentative of society, and have military rather than civilian identities.<sup>921</sup> Thus, Cohen concluded that the twilight of the citizen soldier was nigh, and it had been caused by the drive for a professional military. In *The Combat Soldier* King adds much evidence to Cohen’s claims, indicating that there has been a profound change in US and British combat forces caused by professionalism.<sup>922</sup> Thus, in calling for the rise of the citizen-soldier in society, Wall, and FR20, were emphasising an aspect of a past model of military service without acknowledging the distinctive nature of history and society that had shaped these military forces in the past. Moreover, both appeared to forget that, as I detailed in Chapter Three, the past suggested that increased civilian involvement in the military occurred during periods of high threat, and even then conscription was often resorted to.

There is much evidence that society itself has profoundly changed from that which gave us the Great Generation. In *Bowling Alone*, Robert Putnam details the decline of community in America, which he describes in terms of ‘social capital’. This refers the common bonds of reciprocity between citizens, which, crucially, are independent of market forces. Putnam argues that due to historical and societal factors – most prominently the Depression, the New Deal and the Second World War – the sense of civic duty was the highest amongst the Great Generation born between 1920-40, and has been declining since.<sup>923</sup> To back his claims, Putman cites evidence of declining voting rates, voluntary organisation membership, and sports playing, arguing that the individualism of the ‘baby-boom’ and ‘X’ generations which followed them has led to a major, and potentially terminal, decline of community in the US from the mid-1960s

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<sup>921</sup> Cohen, E. (2001) ‘Twilight of the Citizen-Soldier’, *Survival*, Summer.

<sup>922</sup> King, *The Combat Soldier*.

<sup>923</sup> Putnam, R. (2000) *Bowling Alone*, London: Simon and Schuster, 357.

onwards.<sup>924</sup> Ronald Inglehart's works, *The Silent Revolution*, and *Cultural Shift in Advanced Industrial Society* have provided further quantitative evidence of a decline of collective identities related to the state, public life (including religion) and employment, and the rise of more individualistic and pluralistic Western societies.<sup>925</sup> Interestingly, King has used Putnam's work to argue that Western society as a whole is professionalising, and that its militaries are simply reflective of this wider change. However, the recent attempt to grow and transform the Army Reserve, sitting as it does between society and the increasingly detached professional military, appears to be a particularly useful paradigm within which to explore modern British society.

As has previously been discussed, there was much confidence amongst those calling for its revitalisation that the Army Reserve could quickly be recruited to strength. Based largely on the observation that Australia could muster a reserve force of 19,000 from a population of about a third the size of the UK's, the Independent Commission stated that an Army Reserve target strength of 30,000 by 2015 was achievable. FR20 revised this date to 2018 (later April 2019), and stated confidently: 'The total requirement presents only 0.15 percent of the overall UK workforce and, in an historic context, we require only about half the strength of the Reserves as they were in 1990.'<sup>926</sup> With the other reserve forces removed, as at May 2013, the new Army Reserve would therefore represent 0.10 percent of the workforce.<sup>927</sup> On the face of it, this appeared justifiable: the Options for Change programme had reduced the TA's establishment from 76,000 to 63,500, the latter representing a much higher 0.24 percent

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<sup>924</sup> Putnam, *Bowling Alone*, 31-2, 259.

<sup>925</sup> Inglehart, R. (1977) *The Silent Revolution*, Princeton: Princeton University Press; Inglehart, R. (1990) *Culture Shift in Advanced Industrial Society*, Princeton: Princeton University Press.

<sup>926</sup> *Future Reserves 2020*, 14.

<sup>927</sup> Office of National Statistics (2013) 'Labour Market Statistics, May 2013', available at [http://webarchive.nationalarchives.gov.uk/20160105160709/http://www.ons.gov.uk/ons/dcp171778\\_07508.pdf](http://webarchive.nationalarchives.gov.uk/20160105160709/http://www.ons.gov.uk/ons/dcp171778_07508.pdf), retrieved 14 July 2016.

of the workforce at the time.<sup>928</sup> However, if the Independent Commission had conducted further historical analysis it may have been less confident in its target strengths. Analysis of the mid-1960s – precisely where Putnam identified the beginning of a shift in societal values in the US – reveals much greater TA participation rates. Before the Carver-Hackett reforms of 1964, the TA's trained strength was 107,500, or 0.43 percent of the workforce at the time.<sup>929</sup> The 2013 workforce was almost five million more than those in 1965 and 1990, even when this is taken into account, between 1964-2013 there has been a 76 percent decrease in the Army Reserves trained strength relative to the workforce over this period. Moreover, the workforce metric is limited and is masked by the fact that the UK's population grew 16 percent between 1965-2015. This would suggest that if society had remained the same as it was in 1965, increasing participation rates in the TA would have been very easy. I have already noted Caddick-Adams' argument about the TA's consistent inability to recruit to full strength. More broadly, Strachan has noted that the British military has always struggled to recruit volunteers, and also the decline of militarism in British society since the end of conscription.<sup>930</sup> Edmunds et al. have also correctly identified that Britain's army and reserve army recruitment has historically been closely related to the public's perception of external threat.<sup>931</sup> Indeed, one major explanation for the recent difficulties both forces have experienced recruiting to strength is the negative impact of the wars in Iraq and Afghanistan, which have caused greater public distrust of their political leaders and questioning of the utility of force in general.<sup>932</sup> As Houghton has remarked:

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<sup>928</sup> Lindsay, C. (2003) 'A Century of Labour Market Change', Report for Office of National Statistics, available at [web.ons.gov.uk/ons/.../a-Century-of-labour-market-change--1900-to-2000.pdf](http://web.ons.gov.uk/ons/.../a-Century-of-labour-market-change--1900-to-2000.pdf), 136, retrieved 14 July 2016.

<sup>929</sup> Lindsay, 'A Century of Labour Market Change', 136.

<sup>930</sup> Caddick-Adams, 'The Volunteers', 95; Strachan, 'The Civil-Military Gap in Britain', 43-63.

<sup>931</sup> Edmunds et al., 'Reserve forces and the transformation of British military organisation', 126.

<sup>932</sup> YouGov, (2015) *Report on British attitudes to defence, security and the armed forces*, available at <https://yougov.co.uk/news/2014/10/25/report-british-attitudes-defence-security-and-arme/>, retrieved 9 September 2016.

‘...rightly or wrongly, the legacy of the conflict in Iraq and Afghanistan have been, and still are, hugely challenging. They have affected some people’s perception of the beneficial utility of Armed Force, of the competence of [the British] Defence [establishment] and the wisdom of past government.’<sup>933</sup>

Thus, the shadow of post 9/11 interventions is very important for understanding the current context. But it also seems clear that difficulty recruiting the army and its reserve to their newer, historically small establishment, indicates that there has been a major change in the nature of British society during this since the 1960s as well.

Indeed, Edmunds et al. have identified that some of the recruitment problems are due to changes in British society, and have labelled FR20’s recruitment goals ‘over-optimistic, and perhaps even naïve’ for failing to take stock of these.<sup>934</sup> In a relatively brief discussion, they draw on data from recent British Social Attitudes Surveys to argue that the British population born after 1979 in particular have increasingly liberal views and a greater preference for individual over collective identities.<sup>935</sup> Citing evidence of a decline in religious, political, and trade-union activity, they argue that this group – predominantly Generation Y or ‘Millennials’ – are more sceptical of collective endeavours and ‘suspicious of the institutional conformism required by totalising institutions such as the armed forces.’<sup>936</sup> Some of these trends are worthy of further examination here. For example, in the 1950s the Labour and Conservative parties had a combined total of over four million members, today Labour have an estimated 500,000 while the Conservatives 150,000.<sup>937</sup> The average age of Conservative Party membership is 68.<sup>938</sup> Similarly, only 13 percent of people report going to a religious service once a week or more and the Church of England’s own attendance figures also attest to decline;

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<sup>933</sup> Houghton, N. (2014) ‘Annual Chief of the Defence Staff Lecture’ at RUSI London, available at <https://rusi.org/event/annual-chief-defence-staff-lecture> retrieved 9 September 2016.

<sup>934</sup> Edmunds et al., ‘Reserve forces and the transformation of British military organisation’, 131.

<sup>935</sup> Edmunds et al., ‘Reserve forces and the transformation of British military organisation’, 127.

<sup>936</sup> Ibid, 127.

<sup>937</sup> House of Commons (2015) ‘Membership of UK Political Parties’, Briefing Paper, 11 August, available at <http://researchbriefings.files.parliament.uk/documents/SN05125/SN05125.pdf>, retrieved 26 July 2016; *The Huffington Post*, (7 July 2016) ‘Labour Party Membership Applications Surge 100,000 Since EU Referendum’.

<sup>938</sup> Jones, O. (2015) *The Establishment*, London: Penguin, 69.

in 2013 average Sunday attendance figures were just 785,000, half the number that attended in 1968.<sup>939</sup> Interestingly, this precisely fits the decline of social capital identified by Putnam from the mid-1960s onwards, which has been mirrored by declining participation in the TA and Army Reserve. While these are nonetheless traditional methods of assessing social capital, other trends are emerging. Today the National Trust has four million members and Sky TV 10 million subscribers.<sup>940</sup> Social media use amongst the Y and Z Generation is regarded as contributing to a ten-fold increase in Narcissistic Personality Disorder, while there has been a recent decline in sports participation and gym use in Britain, indicating that heightened individualism has potential pitfalls and as a society we are getting less fit.<sup>941</sup> Complimenting Edmunds et al., and supporting Putnam's and Inglehart's findings, it seems clear that a profound change in the nature of British society has occurred. The implications of these changing societal values – and indeed changing British demographics – for army and reserve recruitment have been identified by Carter, who has made the vision of an 'inclusive' army that is more sensitive to equality and diversity, and more flexible in terms of employment models, one of the major themes of his tenure.<sup>942</sup> But while Edmunds et al. highlight the changed nature of British society, they do not seek to explain the sources of this change.

Numerous British authors have charted how the post-war political consensus which defined the relationship between the British state and its people from 1945-79 has

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<sup>939</sup> Figures available at <https://www.churchofengland.org/about-us/facts-stats/research-statistics.aspx>, retrieved 25 May 2016.

<sup>940</sup> Lieutenant General Sir Paul Newton, Lecture, Exeter Security and Strategy Institute, 6 June 2016.

<sup>941</sup> *The Guardian*, (17 March 2016) 'I, narcissist – vanity, social media, and the human condition', available at <http://www.theguardian.com/world/2016/mar/17/i-narcissist-vanity-social-media-and-the-human-condition>; *The Daily Telegraph*, (11 June 2015) 'Peak physique? Britain's gym bubble busts', available at <http://www.telegraph.co.uk/news/health/news/11668746/Peak-physique-Britains-gym-bubble-bursts.html>, both retrieved 15 July 2016.

<sup>942</sup> Ministry of Defence (2015) 'Vision for an Inclusive Army' available at <https://modmedia.blog.gov.uk/2015/08/03/army-chief-sets-out-vision-for-inclusive-future/>, retrieved 12 September 2016.

been gradually undone by the neo-liberal political ideology of successive Conservative and Labour governments since that date. David Marquand has referred to the post-war consensus as lasting ‘from the mid-1940s to the mid-1970s, [when] most of [Britain’s] political class shared a tacit governing philosophy which might be called “Keynesian social-democracy”’.<sup>943</sup> Both Labour and the Conservatives ‘generally accepted [the] values and assumptions’ of a ‘three-fold commitment to full employment, to the welfare state, and to the co-existence of large public and private sectors in the economy’.<sup>944</sup> This political consensus had been primarily generated by the sacrifices of British ‘Great Generation’ in the Second World War, resulting in Clement Attlee’s famous victory over Winston Churchill in the 1945 election.<sup>945</sup> Riding a tide of popular support, Attlee’s government followed Keynesian economic policies aimed at high rates of employment, nationalising public utilities and major industries, and greatly enlarging the system of social services, including establishing the NHS. Andrew Gamble has argued that the success of the wartime coalition government was also an important factor in generating this consensus, while Peter Clarke has detailed how this extension of free health care to all citizens also had a moral component, increasing social equality between the classes.<sup>946</sup> Trade unions also remained critically strong and a major influence on politics. In Britain, this post-war consensus involving greater state intervention in the economy and the greater provision of social services was accepted by both major political parties for over three decades.

However, in the late 1960s, this consensus began to be undermined by Britain’s increasingly poor economic performance, evidenced in the decreasing competitiveness of British industry, low growth rates, and, especially after the 1973 oil shock, increasing

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<sup>943</sup> Marquand, D. (1988) *The Unprincipled Society*, London: Fontana, 2.

<sup>944</sup> Ibid, 3.

<sup>945</sup> Ibid, 21.

<sup>946</sup> Gamble, A. (1994) *The Free Economy and the Strong State: The Politics of Thatcherism*, 2nd Edition, London: Macmillan, 70; Clarke, P. (1978) *Liberals and Social Democrats*, Cambridge: Cambridge University Press.

inflation and unemployment. Cumulatively and gradually, these caused the development of an institutional crisis as successive governments' interventions in the economy failed. Marquand argues that these failures began a process of 'ideological polarisation which destroyed the post-war consensus.'<sup>947</sup> In his study of the rise of 'New-Right', Gamble shows how the Thatcherites that embodied this reinvigorated liberalism began to argue that the Keynesian 'social-democratic polices had led to the morass of inflation, mass unemployment, excessive taxation and a swollen public sector.'<sup>948</sup> Crucially, Gamble argues that:

‘The particular quarrel of the Thatcherites was with the attitudes and policies to which conservatives had become committed in the 1940s and 1950s. It was their acquiescence in the social democratic hegemony that they wished to change.’<sup>949</sup>

These goals started to be realised when Margaret Thatcher was elected prime minister in 1979 and began pursuing economic policies primarily aimed at reducing inflation and de-regulating the markets rather than maintaining high employment. Numerous policies concerning taxation, local authority reform, and the sale of nationalised industries incrementally but determinedly undid the post-war consensus.<sup>950</sup> These were couched in arguments about rising living standards and efficient economy. These policies led to major social changes in the UK, including the breaking of the powerful trade unions and the privatisation of industry, but also coincided with rising living standards and more rapid, but less stable, economic growth. Meanwhile, the end of the Fordist mode of production and growth of information technology diversified and atomised work forces. Similarly, the share of income going to the top 10 percent of the UK population rose from 21 percent in 1979 to 31 percent in 2009, reversing a deeper negative trend during 1938-79 (closely mirroring the post-war consensus period) and indicating a

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<sup>947</sup> Marquand, *The Unprincipled Society*, 47.

<sup>948</sup> Gamble, *The Free Economy and the Strong State*, 35.

<sup>949</sup> Ibid, 69.

<sup>950</sup> Gamble, *The Free Economy and the Strong State*, 123, 126.

concentration of wealth that potentially undermines social fabric.<sup>951</sup> These outcomes were also linked with rising materialism in the UK – most lavishly embodied by the rise of the city after Thatcher’s ‘Big Bang’ de-regulations of 1986 – but also the Conservatives’ normative argument about the importance of individual freedom and motivation in society. Indeed, Thatcher’s view on the matter is worthy of quoting here:

‘They are casting their problems at society. And, you know, there's no such thing as society. There are individual men and women and there are families. And no government can do anything except through people, and people must look after themselves first. It is our duty to look after ourselves and then, also, to look after our neighbours.’<sup>952</sup>

Crucially, after the Conservatives lost power in 1997, privatisation continued under Blair’s – and indeed sociologist Anthony Giddens’ – ‘Third Way’, reliant as it was on the narrative that due to globalisation state intervention in market forces was fallacy.<sup>953</sup> Under Cameron, the reformation of the state’s role in British society deepened and quickened. There have been major reductions in state spending in almost every department and attempts to further privatise the education and health sectors around Adam Smith’s principle of the ‘invisible hand’ in the drive for efficiencies. This time, the austerity narrative was utilised to justify the use of this 250 year-old guiding principle and masked the political ideology behind it, in spite of the fact it that the deregulation of the banks was a major contributing factor to the 2008 global recession. Indeed, after the cuts to Britain’s armed forces in 2010-11 many questioned whether the state now retained the capability to protect its citizens, indicating that the Hobbesian contract between it and the population may be under threat.<sup>954</sup> Thus, the decline in social capital and the rise of individualism in British society has been accompanied by a

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<sup>951</sup> The Equality Trust (2014) ‘How has inequality changed?’ available at <https://www.equalitytrust.org.uk/how-has-inequality-changed>, retrieved 16 July 2016.

<sup>952</sup> *The Guardian* (8 April 2013) ‘Margaret Thatcher: A life in quotes’, available at <http://www.theguardian.com/politics/2013/apr/08/margaret-thatcher-quotes>, retrieved 15 July 2016.

<sup>953</sup> Watson, M. and Hay, C. (2003) ‘The discourse of globalisation and the logic of no alternative: rendering the contingent necessary in the political economy of New Labour,’ *Policy and Politics*, 31(3).

<sup>954</sup> BBC News, (17 September 2016) ‘UK military ill-prepared to defend an attack, says retired chief’, available at <http://www.bbc.co.uk/news/uk-37391804>, retrieved 21 September 2016.

gradual, but cumulatively profound, parallel change in the nature of the relationship between British society and the state.

It is perhaps not too much to suggest that the neo-liberal values of successive British governments has contributed to the dismantling of post-war consensus underpinned by the Great Generation's sacrifices, the profound re-organisation of the British state in the last three decades, and the rise of individualism. This, in turn, appears to have curtailed the new Army Reserves' ability to recruit to (a historically minute) establishment today. Of course, it is arguable that the nature of the relationship between the British military and citizens also changed with the phased ending of conscription and national service in 1960 and the move to professionalism. However, based on recruitment and retention rates, if FR20 had been attempted in 1965 – by which time conscription and national service had ended and a fully professional army established – the figures cited above suggest that the Army Reserve could have filled 11,000 vacancies in six months to a year, rather than struggling to do so in six years. The Conservatives themselves recognised that the relationship between the state and citizens had changed in FR20: 'We all depend on national security; however, most people choose not to contribute to it beyond paying their taxes.'<sup>955</sup> As a result of the pursuit of neo-liberalist policies, paying taxes is increasingly viewed as the sole civic duty of citizens. Thus, the Conservative government's call for a greater volunteer ethos representative of the commitment of Great Generation's citizen-soldier appears particularly ironic as not only has society changed fundamentally since then, but it has done so as a result of neo-liberal ideals still championed by the very government that made the call. The Conservative Party has overseen both the deep reduction of state involvement in society, and contributed to a change in social attitudes, yet paradoxically expects citizens to flock to the Army Reserve in order to compensate for their defence

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<sup>955</sup> *Future Reserves 2020*, 7.

cuts. It is perhaps significant that this trend has only been reversed with the introduction of major monetary incentives, which have in turn raised concerns at both the senior and junior levels about the quality and commitment of personnel recruited under these terms.

In the final analysis, while an undoubtedly well-meaning attempt to end the neglect of and revitalise the TA, FR20 appears to have been too ambitious in its attempt to routinely and regularly deploy the new Army Reserve at the unit or sub-unit level as part of the army's wider operational readiness cycle. The difficulties that the FR20 transformation has experienced highlight that the political motivations for transformation must be supported by senior *and* mid-level commanders if they are to be successful. They also must not ignore the distinctive institutional character of the organisations they seek to transform. In short, they must be fully workable. Politics not only drives top-down transformations, it can also limit them by ignoring the reality at the bottom of the organisations they seek to transform. If this happens, supporting Allison's arguments, what I label a 'partial transformation' may occur, where some aspects are successful but others that are not are quietly jettisoned. Meanwhile, I have detailed that both logistics and reserve forces transform in broadly similar ways to that identified in the extant literature. Overall, by transforming through top-down, bottom-up and emulative practices spanning both structural and normative/cultural divides, the evidence supports Foley's et al.'s arguments on the need for complimenting sources of military change. Nevertheless, the evidence presented here suggests that transformations of reserve forces are likely to take longer to succeed than in regular forces due to their distinctive part-time nature, their potential threat to the army's organisational survival, and their closer proximity to society that brings with it political advantages. For this reason, transforming reserve organisations can prove more difficult to reform than regular forces. However, there is one final, cautionary observation to be made. As

the evidence above suggests, for peacetime military transformations to succeed in Western democratic states, they must also be grounded in the realities of modern society. Failing to understand how society has been changed by the result of policies that themselves sought to transform society, is failing to identify the nature of society that can make military transformations successful or not, especially in the case of reserve forces. It seems obvious, but ultimately, and even in regular professional forces, in an increasingly individualistic era, military transformations must consider wider societal transformation if they are to be fully successful.

‘Let me just say one last word  
About this word “transformation.”  
It leaves an impression  
That you start in an untransformed state,  
And then you transform  
And become a transformed state.  
Life isn’t like that.  
Life is dynamic.  
It’s changing,  
And really its transforming.’<sup>956</sup>

Donald Rumsfeld,  
US Secretary of Defense  
Pentagon Town Hall Meeting, 6 March 2003.

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<sup>956</sup> Seely, *Pieces of Intelligence*, 40.

## Annex A: Survey Method

### Sample Description

Reserve RLC: REME population (trained and untrained strengths): 3,370: 1,247 = 4,617 total

Participants approached: Approx 1,500

Valid sample size: 2015: 427 2016: 258

2015 Confidence Level: 95 percent

Confidence Interval: 4.5 (this is the +/- percentage within which the survey can predict wider reserve RLC/REME population responses)

Selection method: The survey was later opened to about one third of the population group.

Those surveyed were reserve RLC and REME personnel. Between April and June 2015, and again during the same period in 2016, personnel within these units were asked to participate through the chain of command. The surveys were distributed both on paper and electronically, and were usually completed during duty hours. Participants were informed of the study's purpose, including its voluntary nature and minimal risk to participants. Soldiers were also guaranteed anonymity; for example, individual identifiers were not used and all data has been grouped. No under 18s were included and consent was obtained from all participants.

Approximately 1,500 personnel from a total 43 units were approached to participate, and there were 117 valid electronic responses and 310 valid paper responses. The survey took approximately 25 minutes to complete. The 2015 response rate was 28.5 percent, which is consistent with Army Reserve responses in the 2015 Tri-

Service ResCAS survey (31 percent). The 2016 response rate was too low for statistical significance and forced the use of only three selected sub-units with strong response rates and internal validity. As a result all details here pertain to the 2015 data. On average RLC personnel represented 72 percent of responses, with REME 28 percent. This is representative of the RLC and REME reserve population, and, with missing data excluded testwise, a chi square test for goodness-of-fit confirmed this ( $1, n = 427$ ) = .39,  $p = .53$ . However, as with all surveys, it should be noted that the survey may have captured more enthusiastic members of the population. Less enthusiastic members would conceivably have lower perceptions of cohesion and are also less likely to complete surveys. In 2015, one sub-unit contributed 11 percent of total responses, while a number of units provided .2 percent. On average, each unit contributed five percent of responses. Only sub-units with average or higher contributions to the response rate are examined in this study. Varied responses reflect different emphasises placed by unit commanders on participation, and also the training schedule of sub-units. Generally, the distributions of age and gender in the sample were similar to the latest figures available for the Volunteer Army Reserve, including Group A. Although the sample did include a higher percentage (10 percent) of soldiers in the 45-54 age bracket, previous research has shown that the RLC/REME population is generally older; therefore the sample is representative of the RLC/REME population. Other figures from this population, such as marital status and education, are not publicly available. The average number of officers in the sample (11 percent) is different at statistically significantly levels to the distribution in the reserve population (18 percent), according to a chi-square goodness-of-fit test ( $1, n = 427$ ) = 19.5,  $p = 0.00$  (missing data excluded pairwise).

## **Survey Design and Administration**

The questionnaire consisted of 60 items. Nine items asked respondents about their background characteristics, including which unit and sub-unit they belonged to, level of

education achieved, marital status and time in service. This was followed by the 20 items of Siebold and Denis Kelly's PCI, with items adjusted to focus on the sub-unit, rather than the platoon.<sup>957</sup> 14 items were taken from the Combat Readiness Morale Questionnaire used by Gal, Griffith, and Mark Vaitkus respectively.<sup>958</sup> Four items were added to this section asking respondents for their assessment of the importance of professionalism over social bonds, both personally and in their sub-unit. Five further items asked soldiers about their levels of confidence in FR20 and its impact on their sub-unit. Finally soldiers were asked if they had served with the Regulars in the last 12 months. Those who had proceeded to answer a further seven items on their experiences of working with the Regulars. Possible answers were on a 5-point Likert scale ranging from 1 = 'Very Strongly Disagree/Very Low'; 2 = 'Disagree/Low'; 3 = 'Can't Say/Moderate'; 4 = 'Agree/High'; and 5 = 'Strongly Agree/Very High'. This method of coding followed ResCAS, but differed to Siebold and Kelly's.

### **Individual Perceptions of Sub-Unit Cohesion**

Firstly, in order to prove that Siebold and Kelly's PCI was statistically applicable to British Army Reserve RLC and REME soldiers, these soldiers' responses to PCI items underwent reliability analysis at the individual item and scale levels. At the individual item level, the Cronbach alpha score was .94, indicating excellent internal consistency reliability. Corrected item-total correlations ranged from .51 to .76, indicating all items deserved to be included. The individual inter-item correlations were also similar to Siebold and Kelly's, ranging from .25 to .84. As the PCI created scales to measure each of the combined affective and instrumental elements of the horizontal, vertical, and

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<sup>957</sup> Siebold, G. and Kelly, D (1988) *The Development of the Platoon Cohesion Index*, Washington, Army Research Institute.

<sup>958</sup> Gal, R. (1986). 'Unit Morale: From a theoretical puzzle to an empirical illustration--An Israeli example' *Journal of Applied Social Psychology*, 16, 549-564; Griffith, J. 'Measurement of Group Cohesion in U.S Army Units', 162; Vaitkus, M (1990) An Evaluation of Unit Replacement on Unit Cohesion and Individual Morale in the U. S. Army All-Volunteer Force' *Military Psychology* 2(4):221-239

organisational components of cohesion, it was also necessary to test the reliability of these 10 scales in the current sample. This was done following the PCI item structure outlined in Table 2, in Chapter Seven. At the scale level, the Cronbach alpha score was .92, indicating excellent internal consistency reliability. Corrected item-total correlations ranged from .60 to .78, indicating all items deserved to be included. Inter-scale correlations were also similar to Siebold and Kelly's, ranging from .40 to .70. Overall, the PCI was therefore applicable to the sample at similar levels of significance as Siebold and Kelly's study.

### **Background Characteristics as Predictors of Cohesion, Readiness, and Personal Confidence**

As this survey included a reduced selection (14) of the items used in Gal's, Griffith's, and Vaitkus' morale and readiness studies for brevity, it was necessary to conduct exploratory factor analysis (EFA) on the items used in this survey to determine the underlying relationships between them. Missing values (average 1 percent per variable) were excluded pairwise. The factor extraction method was principal components with varimax rotation. Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy was .89, and Bartlett's test of Sphericity was  $p = .000$ , indicating that factor analysis was appropriate. The content of factors (with loading  $> .30$ ) was then examined. With an eigenvalue set at 1, three major factors emerged. An inspection of the screeplot revealed a clear break after the second factor, and using Catell's (1966) scree test it was decided to retain two factors for further examination. Parallel analysis of principle components confirmed the two factor solution. These three were labelled 'sub-unit readiness and morale' and 'personal confidence' and accounted for 40.7 and 9.9 percent of variance, respectively.

Next, the arrangement of items on the factors implied by the EFA underwent confirmatory factor analysis (CFA) using Amos 22 software. Nine questionnaire items

(sub-unit readiness, soldiers' readiness to fight if necessary, sub-unit togetherness, sub-unit skill in main role, sub-unit morale, confidence in sub-unit major weapons/equipment systems, better trained than most other reserve sub-units, enough time to train as sub-unit, personal morale) were regressed onto the latent construct of 'sub-unit readiness and morale'. Five items (confidence doing job on operations, confidence sub-unit can do job on operations, officer/soldier relationships, confidence in own professional skills and abilities, confidence in personal kit/ weapons) were regressed onto the latent construct of 'personal confidence'. The CFA indicated that the lowest correlated variables on each construct: personal morale and confidence in personal kit/ weapons, respectively, did not fit the model. This was the case even when loaded on the 'personal confidence' construct and these variables were removed to produce an eight and four variable construct respectively.

The overall chi-squared statistic ( $\chi^2$  (53) = 205.59,  $p < .000$ ) was statistically significant. While this would usually result in a poor fit of the data to the specified model, the chi-squared statistic is influenced by larger sample sizes. Larger samples produce larger chi-squared values that are significant even when the data does fit the model. In such cases, the ratio of chi-squared statistic to degrees of freedom is recommended. In this study, this ratio was 3.88. Ratios of 5.0 or less are considered a good fit of data. The comparative fit index (CFI) was .92, over the .90 value requirement. The root mean standard error of approximation (RMSEA), which measures the extent to which the variance-covariance matrix derived from the data differed from that implied by the model was .08. The lower the RMSEA score, the better the 'fit' of the data. Scores of .05 are considered a good fit of data to the model, while scores up to .10 are considered an adequate fit. Finally, all standardised regression paths of items to their respective latent constructs were low to large in size. Values ranged from .33 to .92 and the median score was .65. Once CFA had confirmed the constructs, scales were created.

Next, to examine the relationship between background characteristics, cohesion, Sub-Unit Readiness and Morale, and Personal Confidence outcomes, separate multiple regression analyses, each corresponding to one of these outcomes, were conducted. Predictor variables were soldier background characteristics. Multiple regressions assess the relationship between the each predictor variable and the outcome variable, whilst controlling for all other predictor variables entered into the model. In this study it was necessary to dummy code the cap badge variable into RLC. Separate correlations were then conducted to get REME scores for comparison, although it is important to note that these should be used for indicative purposes only. Due to the fact that standardised coefficients do not accurately represent dummy coded variables (1 = present, 0 = not), unstandardised coefficient B values are presented throughout this study. These represent the relationship between a unit increase in predictor variable values to a unit in outcome variable values. It should also be noted that, as in all multiple regressions, variables outside the model may explain additional variance.

### **Sub-Unit Level Perceptions of Working with Regulars and the Impact of FR20**

In order to gain an understanding of the relationship between the 12 items concerning respondents' experiences of the FR20 reforms and working with the regulars, it was necessary to conduct another EFA. Missing values (average one percent per variable) were excluded pairwise. The factor extraction method was principal components with varimax rotation. Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy was .89, and Bartlett's test of Sphericity was  $p = .000$ , indicating that factor analysis was appropriate. With an eigenvalue set at one, two major factors emerged. An inspection of the screeplot revealed a clear break after the second factor, and using Catell's (1966) scree test it was decided to retain two factors for further examination. Parallel analysis of principle components confirmed the two factor solution. These two were labelled 'Working with the Regulars' and 'Impact of FR20' and accounted for 48.5 and 15.5

percent of variance, respectively. The loading of the individual items on their respective factors is outlined in Table 6 and ranged from .69 to .85, and the median was .77.

**Table 7.**  
**Rotated Item Loading on Factors**

<b>Questionnaire Item</b>	<b>Working with Regulars</b>	<b>Impact of FR20</b>
48. I am optimistic that the Army Reserve reforms will increase the capability of my sub-unit		.712
49. Since the Army Reserve reforms have been introduced (July 2013) my sub-unit is becoming better at its job		.805
50. Since the Army Reserve reforms have been introduced (July 2013) my sub-unit is better equipped		.789
51. Since the Army Reserve reforms have been introduced (July 2013) I have experienced better integration with the Army in training		.735
52. Since the Army Reserve reforms have been introduced I have experienced better integration with the Army on operations	.308	.686
54. Working closely with the Regulars has increased my own professional competence	.765	
55. Working closely with the Regulars has increased my sub-unit's competence	.724	
56. Working closely with the Regulars was a valuable experience	.850	
57. I liked working with the Regulars	.830	
58. I felt the Regulars made me welcome when we worked together	.801	
59. I felt the Regulars understood my role when we worked together	.783	
60. I felt the Regulars utilised my sub-unit correctly when we worked together	.735	

## Annex B: Restricted Interview List

- 1: Privates - Corporals, 142 Squadron 165 RLC Regiment, Banbury, 13 June 2015.
- 2: NCOs, 142 Squadron 165 RLC Regiment, Banbury, 13 June 2015.
- 3: OC/2iC, 142 Squadron, 165 RLC Regiment, Banbury, 13 June 2015.
4. OC, 142 Squadron, 165 RLC Regiment, Banbury, 2 June 2015.
- 5: Privates - Corporals, 398 Squadron, 157 RLC Regiment, 24 June 2015.
- 6: NCOs, 398 Squadron, 157 RLC Regiment, 24 June 2015.
- 7: Privates - Corporals, 160 Fd Coy, 105 Bn REME, 11 July 2015.
- 8: NCOs, 160 Fd Coy, 105 Bn REME, 11 July 2015.
- 9: Officer, 160 Fd Coy, 105 Bn REME, 11 July 2015.
- 10: Privates – Corporals, 232 Sqn, 165 Regt RLC, 20 January 2016.
- 11: NCOs, 232 Sqn, 165 Regt RLC, 20 January 2016.
- 12: NCOs, 160 Fd Coy, 105 Bn REME, 27 July 2016.
- 13: Privates, 130 Fd Coy, 105 Bn REME, 2 February 2016.
- 14: NCOs, 130 Fd Coy, 105 Bn REME, 2 February 2016.
- 16: Major General Kevin Abraham, Andover, 14 January 2014 (Unrestricted).
- 17: Personal communication, Reserve officer, 28 April 2016.
- 18: Major General Dickie Davis, 27 February 2015 (Unrestricted).
- 19: 2iC, 398 Squadron, 157 RLC Regiment, 24 June 2015.
20. Personal communication, 232 NCO, 20 January 2016.
- 21: Personal communication, OC, 398 Squadron, 157 RLC Regiment, 24 June 2015.
- 22: Personal communication, 232 NCO, 5 February 2016.
23. Personal communication, Adjutant, 165 Regt RLC, Fieldwork 7 May 2015.
24. Personal communication, Officer, 7 Rifles, Fieldwork 7 May 2015.
25. Personal communication, NCO, 232 Sqn, 165 Regt RLC, Fieldwork 7 May 2015.
26. Personal communication, CO, 165 Regt RLC, Fieldwork 7 May 2015.
27. Personal communication, OC, 232 Sqn, 165 Regt RLC, Fieldwork 7 May 2015.

## Annex C: Survey

# The Impact of Future Reserves 2020 (FR20) on Reserve Logistics Sub-Units' Cohesion and Readiness: 2016 Survey

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### HOW TO COMPLETE THE QUESTIONNAIRE

The Army Reserve RLC/REME Cohesion and Readiness survey is the first to specifically examine soldiers' attitudes to the impact of the Future Reserves 2020 (FR20) reforms on these units. FR20 is the series of recent investments and changes made to the Army Reserve designed to increase their effectiveness and readiness. It is important that the Army Reserve understands your perceptions of the effect these policies are having on your sub-unit. The information you give will help inform future policies. The survey usually takes about 10-15 minutes to complete.

- Please mark an X, or click if taking the electronic survey, on the box next to the answer that best applies to you – in your CURRENT situation. All surveys are anonymous and your responses will remain absolutely confidential. No attempt will be made to identify you. Only civilian researchers outside of the Chain of Command will see the completed surveys.
- Please note that by completing this survey you have given your consent to participate in this study and confirmed that you are 18 years old or more. However, participation is entirely voluntary and if you choose not to take part this will not disadvantage you in any way.
- If you have any problems or questions regarding the questionnaire please call Patrick Bury on 07724341982 or alternatively email pbb201@exeter.ac.uk

I am 18 years or older and I give my consent to take part in this anonymous, confidential survey.

Yes

No

### PERSONAL DETAILS

Please mark each answer with an X in the relevant box.

1. Are you REME, RLC or Infantry?

Attached cap-badges please choose unit you are currently attached to.

REME

RLC

INFANTRY

2. Gender

Male

Female

Transgender

3. Age group

Please choose category on last birthday

18-24

25-34

35-44

45-54

55-64

4. Rank

Please choose equivalent

Private Soldier

Lance Corporal

Corporal

- Sergeant
- Colour/Staff Sergeant
- WO2
- WO1
- Second Lieutenant
- Lieutenant
- Captain
- Major
- Lt Colonel
- Colonel or above

5. Unit (Battalion, Regiment etc)

6. Sub-unit (Company, Squadron etc)

7. Marital Status

- Single, Never Married
- Married

Living with Partner

Separated

Divorced

Widowed

Prefer Not to Answer

#### 8. Education

Less than GCSE

GCSE

A Levels

A Levels and some college

Obtained degree (BA, BSc etc)

Graduate education (MA, MSc, PhD)

#### 9. Time in service

Please choose closest category

0-11 months

1-3 years

4-6 years

- 7-9 years
- 10-12 years
- 13-15 years
- 16-18 years
- 19-21 years
- Over 21 years

#### SUB-UNIT COHESION INDEX

In this next section, we ask you several questions about your sub-unit and others in it. Read each carefully, and then tick the box to the answer that best describes your opinion.

10. Private soldiers in this sub-unit (Company, Squadron etc) uphold and support Army values

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

- 
- 
- 
- 
- 

11. Leaders in this sub-unit set the example for Army values

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

- 
- 
- 
- 
- 

12. Privates trust each other in this sub-unit

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

- 
- 
- 
- 
-

13. Privates in the sub-unit care about each other

Strongly Agree Agree Can't say Disagree Strongly Disagree

14. How well do Privates in your sub-unit work together to get something done?

Very Well Well Borderline Poorly Very Poorly

15. Privates in this sub-unit pull together to perform as a team

Strongly Agree Agree Borderline Disagree Strongly Disagree

16. Leaders in this sub-unit trust each other.

Strongly Agree Agree Borderline Disagree Strongly Disagree

17. Leaders in this sub-unit care about each other.

Strongly Agree Agree Borderline Disagree Strongly Disagree

18. Privates in this sub-unit can get help from their leaders for personal problems.

Strongly Agree Agree Borderline Disagree Strongly Disagree

19. Leaders and Privates in this sub-unit care about each other.

Strongly Agree Agree Borderline Disagree Strongly Disagree

20. Leaders and Privates in this sub-unit train well together

Strongly Agree Agree Borderline Disagree Strongly Disagree

21. Leaders in this sub-unit have the skills and abilities to lead Privates on operations

Strongly Agree Agree Borderline Disagree Strongly Disagree

22. Privates in this sub-unit know what is expected of them.

Strongly Agree Agree Borderline Disagree Strongly Disagree

23. In this sub-unit the behaviours that will get you in trouble are well known.

Strongly Agree Agree Borderline Disagree Strongly Disagree

24. Privates play an important part in accomplishing the sub-units mission

Strongly Agree Agree Borderline Disagree Strongly Disagree

25. Privates/ JNCOs are proud to be in this sub-unit.

Strongly Agree Agree Borderline Disagree Strongly Disagree

26. How satisfied are the Privates/ JNCOs in this sub-unit with the time for family, friends and personal needs?

Very Satisfied Satisfied Neither satisfied nor dissatisfied Dissatisfied Very dissatisfied

27. How satisfied are Privates/ JNCOs with social events in this sub-unit?

Very satisfied Satisfied Neither satisfied nor dissatisfied Dissatisfied Very dissatisfied

28. Privates/ JNCOs in the sub-unit feel they are serving their country

Strongly Agree Agree Can't say Disagree Strongly Disagree

29. Privates/ JNCOs in this sub-unit have opportunities to better themselves.

Strongly Agree Agree Can't say Disagree Strongly Disagree

#### SUB-UNIT READINESS AND MORALE

In this next section, we ask you several questions about your attitudes toward your equipment and your sub-unit (Eg Company/Squadron etc). Read each carefully, and then tick the box to the answer that best describes your opinion.

30. What is the level of morale in your sub-unit (Company/Squadron etc)?

Very High    High    Moderate    Low    Very Low

31. How would you describe your sub-unit's readiness for operations?

Very High    High    Moderate    Low    Very Low

32. How would you describe your fellow soldiers' readiness to fight if and when it is necessary?

Very High    High    Moderate    Low    Very Low

33. How much confidence do you have in your sub-unit's major weapons/equipment systems?

Very High    High    Moderate    Low    Very Low

34. How much confidence do you have in your personal kit/ weapons?

Very High    High    Moderate    Low    Very Low

35. How would you rate your own professional skills and abilities as a soldier (operating and maintaining your equipment, using your weapons, etc.)?

Very High    High    Moderate    Low    Very Low

36. How would you describe your sub-unit's togetherness, or how "tight" are members of your sub-unit?

Very High    High    Moderate    Low    Very Low

37. What is the level of your personal morale?

Very High    High    Moderate    Low    Very Low

38. The relationships between officers and NCOs/soldiers in your sub-unit are?

Very Good    Good    Moderate    Bad    Very Bad

39. What is the level of your sub-unit's (Company/Squadron etc) skills in its main military role?

Very High   High   Moderate   Low   Very Low

40. How confident are you that, given sufficient pre-deployment training, you can do your job on operations?

Very High   High   Moderate   Low   Very Low

41. How confident are you that, given sufficient pre-deployment training, your sub-unit can do its job on operations?

Very High   High   Moderate   Low   Very Low

42. We have enough time to train together as a sub-unit.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

43. I think we are better trained than most other sub-units in the Army/Army Reserve.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

44. In my sub-unit, it is more important to be a good soldier than to be liked.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

45. I would be friends with somebody in my sub-unit who is not up to the required professional standard.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

46. I worry a lot about not meeting the expected professional standard in my sub-unit.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

47. In my sub-unit it is more important to be 'one of the lads', or accepted socially, than to be a good soldier.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

If you are a REGULAR, thank you for your time and you have completed the survey. Please  
CONTINUE if you are a RESERVIST.

#### FR20 AND INTEGRATION WITH THE REGULARS

In this section we ask you about your experiences of the reform of the Reserves (FR20) and working with the Regular Army. FR20 is the series of recent investments and changes made to the Army Reserve designed to increase their effectiveness and readiness.

48. I am optimistic that the Army Reserve reforms will increase the capability of my sub-unit.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

49. Since the Army Reserve reforms have been introduced (July 2013) my sub-unit is becoming better at its job.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

50. Since the Army Reserve reforms have been introduced (July 2013) my sub-unit is better equipped.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

51. Since the Army Reserve reforms have been introduced (July 2013) I have experienced better integration with the Army in training.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

52. Since the Army Reserve reforms have been introduced I have experienced better integration with the Army on operations.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

53. Have you worked closely with the Regular Army in the past 12 months?

Yes

No

If YES, please CONTINUE to answer the questions below. If no, thank you for your time and you have completed the survey

54. Working closely with the Regulars has increased my own professional competence.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

55. Working closely with the Regulars has increased my sub-unit's competence.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

56. Working closely with the Regulars was a valuable experience.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

57. I liked working with the Regulars.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

58. I felt the Regulars made me welcome when we worked together.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

59. I felt the Regulars understood my role when we worked together.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

60. I felt the Regulars utilised my sub-unit correctly when we worked together.

Strongly Agree   Agree   Can't say   Disagree   Strongly Disagree

Thank you for taking the time to complete the survey, your responses are very much valued.

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