Participants in Exercise NORDIC RESPONSE 2024 study a map.
Photo by Ingvild Ekrol, Norwegian Armed Forces

HOW TO PREPARE AND DEPLOY OPERATIONAL LIAISON AND RECONNAISSANCE TEAMS

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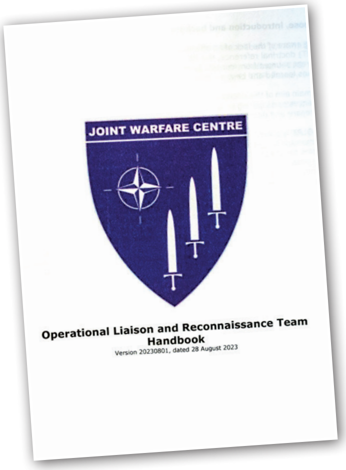
DURING MOST OF THE EXERCISES the Joint Warfare Centre (JWC) has directed in recent years, an Operational Liaison and Reconnaissance Team (OLRT) was part of the training audience. As a member of the JWC Advisory Team, I have observed and advised a number of these OLRTs deployed to the JWC or elsewhere. There is no doctrine on preparing and conducting an OLRT, and I have observed different approaches leading to different outcomes; some of the teams faced significant challenges on the way, and in some cases, there was room for improvement. Although we determined good practices and lessons identified, many of them could have been captured better in order to share them with the wider NATO community of interest. This article aims to share such good practices and lessons identified to support the optimization of OLRT preparation and performance.


JOINT WARFARE CENTRE
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Above
The JWC OLRT Handbook

As mentioned, there is no OLRT-related doctrine, but that does not mean that there is no information on the subject. For example, there is the Allied Command Operations Joint Task Force (JTF) Standing Operating Procedure (SOP) 001 and several related SOPs. Various NATO databases contain a number of documents and presentations on the subject.

One of the documents I found was a 2015 article in The Three Swords, "Key Observations from High-Performing Operational Liaison and Reconnaissance Teams" by Lieutenant Colonel Charles Kurz (Ret.). This article, together with lessons identified and good practices from exercises and real-world activities, was the basis for the development of the JWC OLRT Handbook, which was finalized and approved in 2023.

In this article, I will provide a general description of an OLRT, its mission and concept, followed by a closer look at its possible composition as well as tasks and responsibilities. Nevertheless, the focus of the article will be on practical information as was used for the development of the JWC OLRT Handbook.

Before we can discuss composition, tasks and responsibilities of an OLRT, we need a clear understanding of what an OLRT is. Although there is no definition, several descriptions cover the same important aspects. Based on this we can describe an OLRT as "a very high-readiness, cross-functional team allowing the operational commander to gather situational awareness early in the planning process." Also, that it "enables rapid establishment of liaisons and reconnaissance in an area designated as a possible future theatre of operations and provides advice on contingency planning and operational issues, ranging from but not limited to force composition, logistics, and command and control."

The mission of the OLRT is to answer requests for information (RFIs) from the Joint Operations Planning Group (JOPG) by gathering data from a wide range of sources populating the political, military, economic, social, information, and infrastructure (PMESII) domains. The OLRT assess, analyse, comment on, and relay the refined information, answering the JOPG RFIs as part of the deliberate crisis response planning (CRP) process.

The OLRT are the eyes and ears of the operational commander in a potential theatre providing the "ground truth" that will assist in directing the operational-level planning towards viable, practical and realistic options for any potential future NATO deployment. Deployment, redeployment, tasking, and defining the responsibilities of an OLRT need careful consideration. One factor to consider is the limited time an OLRT has to stand up, deploy, and become operational, upon which the team also needs to establish initial contacts and build trust with relevant actors.

It is important that the commander provide direction and guidance through a personal briefing to the OLRT. Not only does this express the commander's support to the OLRT and their mission, it also helps to focus the OLRT on what the commander requires and expects from the mission of the OLRT. Finally, it gives the OLRT the opportunity to ask the commander for clarification when required.

NOW I WOULD LIKE TO expand on the possible composition, tasks and responsibilities of an OLRT. An OLRT is a mission-configurable grouping, and in order to remain flexible, such a team will never be of a pre-determined size. An OLRT could be composed of only a few people equipped with a satellite phone, although a larger group of 20 to 50 people is more common. Only in the most unusual circumstances is the team likely to be any larger.

The staffing of the OLRT is a task for the entire headquarters, including its designated Joint Logistics Support Group (JLSG). Every position in the OLRT must have at least two people, the primary and secondary person, appointed to a position. The OLRT should be staffed with an appropriate level of command, ideally a one-star flag officer, to liaise with high-level political and military authorities.

The OLRT normally consists of two teams: the core team and the base team. The core team is a flexible, scalable, and cohesive team ready to deploy on short notice. The base team is a pool of trained and deployable personnel with specific expertise, able to deploy with the OLRT when required.

Below
A simulated OLRT training in Türkiye in preparation for NATO Exercise STEADFAST DAGGER 2024, March 13, 2024. Photo by Multinational Joint Warfare Centre PAO

Left
Key leader engagement during the simulated OLRT deployment training in Türkiye, March 13, 2024, in preparation for NATO Exercise STEADFAST DAGGER 2024. Photo by Multinational Joint Warfare Centre PAO

Although this is not always captured fully in a job description, it is important that the nominated OLRT members possess a high degree of personal initiative; they must be proactive and self-directing, able to translate a commander's intent into action, and capable of working long, non-standard hours under difficult conditions. In addition, their English language proficiency must be outstanding.

The primary task of the OLRT is to provide first-hand situational awareness and answer requests for information from the Joint Operations Planning Group. They do so mainly through reconnaissance and liaison activities. The entities they liaise with are host nation authorities and other relevant governmental and civilian organizations that can have an impact on future NATO operations.

As mentioned earlier in the introduction, this article will focus on practical information, lessons identified, and good practices from exercises and real-world activities. Although there are multiple aspects to consider, I will narrow my focus on the following topics: preparation of an OLRT, the required expertise and competences, and conduct and processing of engagements. It will come as no surprise to the reader when I state that good preparation is the basis for a successful OLRT. However, what precisely constitutes "good preparation"?

THE TRAINING AND PREPARATION of an OLRT is a continuous and time-consuming process that requires sufficient funding and resources. The three basic OLRT training planning phases are:

→ **Phase A.** Basic individual and educational training, mainly consisting of academic sessions to create a common understanding of the different roles, responsibilities and functions within and related to an OLRT;

→ **Phase B.** Pre-deployment preparation, consisting of a four- to five-day training event focused on the rehearsal of procedures and engagement activities;

→ **Phase C.** Final preparation of an OLRT through the execution of an exercise and related rehearsals. This should preferably be synchronized with the Joint Operations Planning Group training and take place prior to the crisis response planning.

GENERIC ASPECTS RELEVANT FOR AN OLRT DEPLOYMENT

Personnel issues: legal status, national requirements, administrative aspects and family support;

Strategic situation: the PMESII and ASCOPE (area, structures, capabilities, organizations, people, events) domains; a strategic update, including key historical and cultural events, weather, geography and terrain;

Military situation: maritime, air, land, cyberspace, space, information, but also factions, paramilitary, and their asymmetric capabilities;

Threat assessment: security assessment and risks, security procedures, information security, security classifications and counter-intelligence;

Health and safety: basic medical knowledge, required vaccinations, medical protection, mine awareness, countering improvised explosive devices (C-IED) awareness and chemical, biological, radiological and nuclear (CBRN) training;

Financial aspects: reimbursement of shared and national costs, personal expenditures, and regulations for the use of credit cards and cash.

In addition to these generic aspects, OLRT training and education needs to cover a number of more practical aspects:

→ Being able and authorized to drive in various types of terrain/difficult urban environments; advanced driving and basic mechanics; being familiar and effective with small arms, including grouping, firing from different positions, contact drills and car drills; gaining awareness of the risks and being capable of avoiding and surviving capture;

- Gaining knowledge and experience in conducting engagements; preparation, conduct and reporting; behavioural and cultural awareness and working with interpreters; preparation for interaction with the media; improving media awareness and interview techniques; eliciting information through tactical indirect questioning;

- Basic ability to conduct accurate assessments and analysis of other nation's security forces, including their willingness and combat power; knowing how to manage and add value to information through critical thinking; knowledge on the classification of documents and carefully balancing the principles of need-to-know and need-to-share.

Taking a closer look at the expertise and competences required of an OLRT member, it is clear that the base team should consist of the required joint functions, advisors and domain expertise, based on the tasks defined for a specific OLRT deployment. Besides these individuals chosen for the tasks at hand, there is also a need for additional expertise and support, for example from CIS, logistics and sustainment, drivers, interpreters and, where available, specific civilian experts.

All these staff do not only need functional expertise but also a good understanding of the processes, instructions, and direction and guidance they have received. Furthermore, they need to be aware of the area and situational circumstances of a potential deployment and possess related language skills and cultural expertise.

To round off this article, I shall expand on some more practical aspects, lessons identified, and good practices derived from exercises and real-world activities. More specifically, I will focus on the preparation, conduct and processing of engagements, starting with definitions of engagements activities that can take place within the context of an OLRT.

"A military engagement within the context of an OLRT should be consistent, culturally sensitive, credible, adaptive, balanced, and pragmatic."

Above
A simulated key leader engagement during the STEADFAST DAGGER 2024 OLRT training.
Photo by Multinational Joint Warfare Centre PAO

AN ENGAGEMENT WITHIN the military context is any form of human interaction aimed at delivering influential messages in support of the overall campaign objectives. The engagement may have an impact on perception, attitude and behaviour, and should therefore be consistent, culturally sensitive, credible, adaptive, balanced, and pragmatic. Engagements can be deliberate or dynamic, and the planning and execution of such engagements will vary according to their type. A deliberate engagement is a planned and anticipated personal interaction designed to create a specific outcome. Dynamic engagements are unanticipated encounters for which there has been no specific planning. The ability to exploit deliberate and especially dynamic engagements depends heavily on training and experience.

An engagement is generally a two-way communication activity in which actors aim to achieve specific goals. There are a number of principles to keep in mind for an efficient and effective engagement. Firstly, an engagement must be consistent, meaning words and actions should be aligned. Closely related to this is credibility, trust, and openness — but at the same time awareness of operational security. Furthermore, an engagement must take into account local customs, beliefs and appropriate ways of communicating. Finally, the engager needs to find a balance between achieving the desired effect and listening to and understanding the engagee's point of view. This requires from the engager the capability to think critically and use reasonable judgement to deal with ambiguity, accept prudent risk, and quickly adjust to evolving situations. All this means that engagement approaches must be realistic and pragmatic.

Key leader engagements (KLE) are engagements between NATO military leaders and the key decision-makers of approved audiences. These engagements have a defined goal, for example influencing local leaders. KLE is a planned and anticipated personal interaction designed to create a specific effect. An engagement between a NATO military leader and someone who does not belong to a NATO-approved audience is by definition not a KLE but "just" an engagement. Furthermore, regular interactions between key leaders and other headquarters within the NATO Command Structure are considered routine chain-of-command activities and not KLE.

Strategic engagements are those that are conducted at the strategic level to influence specific non-military instruments of power, in pursuit of strategic objectives. At the operational level, strategic engagement will normally be conducted by the commander, or in exceptional cases delegated to the deputy commander. Strategic engagements are not delegated below joint force command level.

The approach to managing engagements will largely depend on the structure of the HQ and the expertise and number of personnel involved in the process.

Three elements are needed to ensure an efficient and effective engagement process:

- **Engagement strategy:** sets the long-term aim for engagement activities. It may be broken down into specific areas or groups of areas and should direct who will engage and with whom. An engagement strategy should be nested within the engagement strategy of higher HQs.

> An OLRT is a high-readiness, cross-functional and mission-configurable group of select people acting as the ears, eyes and voice of the operational commander and providing the ground truth for a possible future NATO deployment.

Above
A simulated key leader engagement during the simulated OLRT deployment training in Türkiye, in preparation for NATO Exercise STEADFAST DAGGER 2024, March 13, 2024.
Photo by Multinational Joint Warfare Centre PAO

→ **Engagement plan:** provides more detail on the delivery of the engagement strategy. It may give a desired time period based on aspects such as the desired frequency of engagement, the date of the last engagement and current events.

→ **Engagement matrix:** provides a spreadsheet overview of the timing of future engagements as well as records of what has happened previously and when.

Although no two engagements will be the same, a common approach should precede and follow each engagement event. An engagement may be instigated reactively or proactively; for example, it may result from an invitation, or it might be brought about more proactively by following up an engagement opportunity recommended by the staff, or originating from the engagement plan.

To establish successful engagement activities, one must consider a number of aspects. Engagements need to be: "**Pre-planned;** the subjects to be discussed during the engagement should be part of an overall plan. **Effects-based;** the engagement need to have a purpose tied to objectives and messaging derived from the StratCom framework. **Targeted;** individuals selected for engagement and the personnel chosen to engage should be carefully selected based on abilities, interests, access and influence. **Integrated and coordinated;** engagements must be undertaken as a 'whole of enterprise' function involving multiple functions and capabilities. **One-on-one;** engagements should be conducted one-on-one but preferably face-to-face. **Pro-active and forward-looking;** engagement planners should seek opportunities both in and beyond the planning horizon. **Networked;** it is essential that all engagement activities are synchronised." (NATO Engagement Handbook, September 2017)

The above indicates that preparing, conducting, and assessing an engagement is a complex task that requires specific knowledge and expertise. No one person is able to provide all this knowledge alone. Engagement planning requires input from and coordination of the entire staff, particularly special advisors such as the legal advisor (LEGAD) and political advisors (POLAD), but also from specific functions and capabilities such as strategic communications (StratCom) and civil-military cooperation (CIMIC).

As a start, the POLAD need to provide an in-depth pre-deployment briefing to the entire OLRT, addressing the overall political situation and pointing out the political sensitivities of the developing crisis that can affect the success of a NATO mission. The briefing should also provide additional information about the political organizations and important political actors, with a special focus on their stance towards NATO and a possible future NATO deployment. The POLAD may join the OLRT deployment, but more realistically, they will be available for the OLRT as reach-back. Finally, the POLAD can help establish contact with diplomatic authorities in the host nation.

Cooperation with a lead diplomatic authority in the host nation would greatly assist the OLRT by providing briefings, contacts, and approved secure means to store classified documents and communications equipment. Although there is most likely no need to deploy the POLAD because reach-back will suffice; this is decidedly different for the LEGAD. The preferred option is that one LEGAD stay with the headquarters and support the JOPG, while another LEGAD deploys with the OLRT.

The LEGAD can provide on–the-spot legal advice, technical guidance, advocacy, and other legal support while ensuring compliance with NATO guidance and Alliance obligations. In this context, the deployed LEGAD should be prepared with draft versions of potential host nation support arrangements, intelligence-sharing agreements, and other documents required for coordination with the host nation.

Furthermore, this LEGAD can advise on issues arising from the deployment, such as the applicability of the law of armed conflict, criminal jurisdiction and the use of force. Finally, it is unlikely that a status of forces agreement (SOFA) is in place during the OLRT deployment. This will have a significant impact on the legal status of the OLRT members. Without a SOFA, it is not always readily apparent which laws govern the deployed members of the OLRT.

The StratCom function is responsible for providing advice and recommendations on effects, objectives and the coherence of the engagement activities. Within StratCom, information operations (Info Ops) will serve as the advising and coordinating section for all activities that affect the information environment and engagements. The StratCom framework is the primary tool to provide direction and guidance for the planning and execution of engagements, ensuring a consistent approach to them. The OLRT preparation phase provides a good opportunity to start the development of an initial StratCom framework, including key messages and themes preferably based on existing higher-level StratCom frameworks.

NATO's decision-making process requires close interaction between military and civil actors on various levels. A military aspect may affect civil actors and vice versa. Therefore, CIMIC should be part of the OLRT to establish and maintain close coordination with civil organizations and government officials. The information gained by CIMIC must be shared within the OLRT as well as with the JOPG, and it must be available to all other branches of the HQ to ensure the civil-military factors are considered during the planning process and integrated into operational plans. Besides this, CIMIC is the function to initiate and support civil-military interaction (CMI) activities before and during the deployment of the OLRT.

The author, right, with one of the JWC's former legal advisors. Photo by Tore Ellingsen

Conclusion

It is generally understood that good preparation is the key to success, and this certainly applies to the deployment of an OLRT. But what does such OLRT preparation entail? In this article I have pointed out the need to capture and share the best practices and lessons identified, especially because there is no doctrine or a clear definition of an OLRT.

Using a description developed from the available information and combining this with the mission of an OLRT provided in JTF SOP 001, we can say that an OLRT is a high-readiness, cross-functional and mission-configurable group of select people acting as the ears, eyes and voice of the operational commander and providing the ground truth for a possible future NATO deployment. There should be an appropriate level of command, ideally a one-star flag officer, to liaise with high-level authorities.

The mission of an OLRT is to answer requests for information from the JOPG by gathering the required information from a wide range of sources. The OLRT must assess, analyse and comment on this information before relaying the outcomes to the JOPG. Before the deployment of an OLRT, the team's task and mandate need to be absolutely clear. In this context it is important that the operational commander provide their direction and guidance to the OLRT through a personal briefing.

Furthermore, this article has outlined the ways to prepare an OLRT including the need for proper resources, funding and realistic timelines, the required expertise and competences of the OLRT members, and the preparation, conduct and process of different forms of engagements in the military context.

Finally, I have described a number of special advisors and specific functions required in an OLRT and the best way to integrate and deploy LEGAD, POLAD, StratCom and CIMIC, including the latter's role in civil-military interaction activities. ✦

References

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