

Terms of Reference Concept Note

Caribbean Advisory and Strategic Level Workshop of Local, Regional and Global Focal Points – Advisory Level Group (CMR ALG) (23/10/2023 – 27/10/2023_ for a total of 5 days)

Coordinated by: IFRC CMR Regional Coordination, French Red Cross PIRAC, CADRIM Platform with the support of technical areas and Regional CMR Instructors

1. Introduction and background

The changing nature of modern conflicts, natural hazards and crises make dialogue and interaction between civil protection and humanitarian responders and the military ever more relevant. Civil-military coordination is crucial in supporting humanitarian assistance and disaster relief. The scope and form of the civil-military interaction always depends on the specific context of the crisis. A case-by-case evaluation is necessary to safeguard the humanitarian space and the perception of aid as independent and neutral.

Coordination strategies range from:

- **Co-existence:** focusing on de-confliction and on minimizing inconsistency.
- **Cooperation:** focusing on harmonizing a combined effort, could be adopted in natural disasters, as appropriate.

Civil-Military coordination is essential to maintain a clear distinction between civil and humanitarian responders on one side, and the military on the other. Humanitarian aid assistance needs to be delivered according to the humanitarian principles¹ and there should be no duplication of efforts.

Certain humanitarian emergency and disaster situations require capabilities available only from the military community. Such services include strategic air and sealift, medical support and medical evacuation capacities, specialized engineering capabilities, etc. Humanitarian and civil protection responders may request support from the military, as a last resort, when no civilian or commercial option is available, in accordance with internationally agreed civil-military guidelines (i.e. Oslo² and MCDA³) and

¹ The principles of humanity, neutrality, impartiality, and independence are fundamental to humanitarian action.

² Oslo Guidelines on the use of foreign military and in disaster relief, revised in November 2007 (<https://www.unocha.org/sites/unocha/files/OSLO%20Guidelines%20Rev%201.1%20-%20Nov%2007.pdf>)

³ Guidelines On the Use of Military and Civil Defence Assets to Support United Nations Humanitarian Activities in Complex Emergencies, March 2003, revised January 2006

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recommended practices. Exceptionally, assistance by the military might also be required in order to create appropriate safety conditions for humanitarian workers to deliver aid and operate in complex emergencies.

Dialogue and interaction between civilian and military actors in humanitarian emergencies are essential and necessary to protect and promote humanitarian principles, avoid competition, minimize inconsistency, and when appropriate, pursue common goals. Basic strategies range from co-existence to cooperation. Coordination is a shared responsibility facilitated by liaison and common training.

The IFRC with its leading role in disaster response, has a key interest in the Civil Military Relations interface, but it is the National Societies that are at the forefront of civil-military interaction with their domestic military and security services. Indeed, all three components of the Movement have a vested interest in a well-developed and coordinated CMR strategy or plan of action in the area of disaster response and also following, understanding and promoting our Fundamental Principles.

It is identified in the humanitarian environment, the need to be understood in our humanitarian role coordinating with security forces, military, security and civil entities, respecting our fundamental principles and, depending on the scenario, be able to coordinate, cooperate or coexist with the different stakeholders engaged within humanitarian operations in the context of a natural disaster.

As Xavier Castellanos, current IFRC Under Secretary General (USG) and former IFRC Regional Director for Asia Pacific (AP) stated: *“In AP, the frequency of disasters is high, and the involvement of militaries is often significantly beyond the “last resort” principle envisaged by Oslo”*. Indeed, in some contexts, the use of the local military and security forces in disaster response is institutionalized and there has been an historical effort from different institutions to understand the logic of the stakeholders involved in a response, considering as well other Red Cross Partners that are active in the Civil Military space. Globally, the United Nations Office for the Coordination of Humanitarian Affairs (OCHA) and the World Food Program (WFP) are key actors on CMR and play an important coordinating role for the broader humanitarian community with military actors. Nevertheless, we should generate spaces to analyze initiatives, which potentially impact on Red Pillar space (Opening Remarks: Second Civil-Military Relations Forum, 6-10 October 2017, Kuala Lumpur, Malaysia).

The Americas Regional Office (ARO) seeks to continue the IFRC promotion of the CMR within the region and be considered a reference regarding CMR within our National Societies and the different institutions. Particularly to develop a CMR strong network within the region, it is key to generate a workshop in the

(<https://www.unocha.org/sites/unocha/files/01.%20MCDA%20Guidelines%20March%2003%20Rev1%20Jan06.pdf>)



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subregions, now in the Caribbean, to strengthen the relations with the security forces, military and civil stakeholders and generate a long-lasting knowledge of CMR that promotes capacity building. This training will be followed by a platform of CMR discussion, where advisors on CMR will support panel discussions, key topics regarding CMR will be analyzed and a deeper consciousness on CMR will be promoted.

This event is part of the activities that will be co-organized by the International Federation of the Red Cross (IFRC) and French Red Cross PIRAC, within the framework of the Agreement on IDRL -CMR- Induction to IFRC Operations signed between the IFRC and French Red Cross PIRAC in December 2023. The events are financed by French Red Cross PIRAC (Regional Intervention Platform for the Americas and the Caribbean) through its “READY 360° phase 1” Project co-funded by INTERREG Caribbean.

Founded in 2005, with its main office in Guadeloupe, the Regional Intervention Platform for the Americas and the Caribbean (PIRAC) is the representative Delegation of the French Red Cross for the Caribbean region, implementing programs and humanitarian operations, both at domestic level (in support to the 5 FRC Caribbean Overseas Branches) and at regional level in support to the Caribbean National Societies.

With the support of the Local Councils of Martinique, Guadeloupe and French Guiana, and in compliance with the status of the French Red Cross as an auxiliary of public authorities, PIRAC has become a major actor of regional cooperation and humanitarian action in the Caribbean.

PIRAC assists the Caribbean populations affected by major disasters and crisis and develops actions to strengthen the resilience of Caribbean people and support Red Cross entities in the French territories and the broader Caribbean, in coordination with the IFRC.

PIRAC enjoys excellent cooperation relations with both the French Army in the Antilles (FAA) and the French Prefecture of the Antilles Defense and Security Zone.

PIRAC regularly cooperates operationally with the FAA for the deployment of emergency stocks in the Caribbean region in the context of disasters or epidemics.

PIRAC maintains close relationships with the Prefect of the Antilles Defense and Security Zone-*EMIZA* (the zone includes Martinique, Guadeloupe and the Northern Islands), responsible for the coordination of national defense and security measures and the coordination of cross-border cooperation policy.

The Prefecture of the Antilles Defense and Security Zone ensures the coordination of actions in the field of civil security, and as such, prepares for prevention, protection, and relief measures to respond to the consequences of risks that could affect the Caribbean zone. If needed, it can mobilize all civil and military resources, public or private, to make them available to the prefects of the departments who are in charge of relief operations.

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For all of its missions, the zone prefect has under his direct authority the Inter-ministerial Staff of the West Indies Zone (EMIZA), which is able to activate, as quickly as possible, the Zonal Operational Center (COZ) that enables the implementation of the zonal crisis management strategy.

2. Goal and Key Objectives

Goal: Contribute to the strengthening of Civil-Military Relations through an Advisory and Strategic Level Workshop of Local, Regional and Global Focal Advisory Level Group (CMR ALG) aiming at developing a regional strategy for enhanced quality humanitarian operations and efficient cooperation between civil and military actors.

To this end, it is important to highlight that the great efforts made by many National Societies in terms of cooperating and coordinating with security, military, security, and civilian bodies within emergency response operations, thus integrating CMR transversally. These efforts were recently concretized within several crisis: the response to COVID-19 and the response to the ETA / IOTA hurricanes, among others. There is nevertheless a urgent need to develop further a solid regional strategy for CMR within regional emergency operations, set-up a civil-military network of actors and build their capacity in civil-military cooperation.

Key objective 1: Consolidate Civil Military Relations Networks and develop a regional civil-military strategy through the Advisory and Strategic Level Workshop of Local, Regional and Global Focal Points – Advisory Level Group (CMR ALG)

Key activity for objective: Strengthen National Societies institutional capacity in Civil-Military Relations.

High Level Workshop on CMR

a. Introduction

Disseminate technical knowledge on CMR to provide designated CMR focal points with operational tools to understand how to act in the field and be able to contribute from this approach to disaster and crisis management.

The workshop aims to equip humanitarian and military actors with the skills and knowledge necessary to communicate and, where appropriate, effectively interact and coordinate with each other.



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This five-day workshop will be facilitated by a team experienced in civil-military relations, with backgrounds including military service, humanitarian organizations and current IFRC and ICRC delegates. Participants themselves will play a critical role in the course by sharing their experiences and perspectives and participating in the discussions and exercises.

One of the key components – and objectives – of this workshop is that participants have the up to date knowledge to develop an appropriate civil military relations strategy or plan of action for their own country/ island/ government/ regional organization and the future of CMR in the Caribbean Region.

The workshop objectives / desired outcomes are listed below. These objectives will help the RCRC Movement achieve its CMR end state.

Key objective 2: Consolidation of Civil Military Relations Networks and development of a regional strategy through the Advisory and Strategic Level Workshop of Local, Regional and Global Focal Points – Advisory Level Group (CMR ALG)

Advisory and Strategic Level Workshop of Local, Regional and Global Focal Points (2 of 2) – CMR Advisory Level Group (CMR ALG)

a. Background

In 2005, the Council of Delegates adopted a Guidance document on relations between the components of the Movement and military bodies, hereafter referred to as the 'Guidance document'⁴, that recommends a common and more coordinated approach to Civil-Military Relations (CMR) across the Movement, in both national and international contexts.

Thirteen years later, Movement components have implemented both the Guidance document on engagement with military bodies / security forces and the Seville Agreement⁵ to differing degrees, shaped by their interpretation and application of their mandate and the Fundamental Principles, their understanding of their role vis a vis, public authorities, and the resources available to undertake CMR.

Additionally, the requirement for a common and coordinated approach to CMR has increased due to several factors, including:

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- military bodies⁶ and security forces are increasingly likely to have a role in disaster preparedness and response, as the scope, scale, complexity and duration of disasters outstrip the capacity of domestic and international civilian entities to respond effectively,
- the presence of domestic and foreign military forces / security forces and the multiplication of non-state armed groups in humanitarian operating environs further increases both the complexity and likelihood of Movement components' contacts with military bodies,
- other humanitarian organisations are engaging with military bodies and security forces using differing approaches on a variety of topics. The absence of a common approach among humanitarian organisations confuses militaries and weakens efforts to preserve humanitarian space and principles, and
- multiple Movement components, including National Societies (NS) deployed outside of their national territories, are increasingly present in the same environs as the afore mentioned military bodies, other humanitarian organisations, and civil stakeholders.

Movement components have made efforts to enhance cooperation and coordination on CMR prior to, during and after any disaster response, mostly at a regional level. Specifically, the work undertaken in Asia-Pacific and Americas laid the groundwork for cross-fertilisation of practices, and further commitment to the respective regional CMR approaches including sending staff to attend training within their regions and in other regions, identifying, validating, and sharing applicable lessons learned and best practices. The capitalization of these lessons learnt and implementation of best practices on a global level would enhance the Movement's ability to prevent and alleviate suffering.

Following agreement between IFRC and ICRC at regional level, the understanding that CMR must not only be an operational and tactical approach, but also a strategic one where the Red Pillar (RCRC Movement) and others can gauge the changes and approaches before, during and after a disaster are key and must be addressed. In addition, the development of a global (or regional) inter-disciplinary CMR approach, drawing lessons from regional experiences (both from the movement, governments, and regional agencies) and contributing to overall coherence is decisive.

b. Objective

The objective of this meeting is to ensure broader support to the Movement approach to CMR in disaster management by ensuring that key representative stakeholders from across the Movement, governments,

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security forces and civilian organizations that already play a big part in the overall disaster response effort are consulted and endorse the existing CMR strategy. They will identify bottlenecks, gaps and potential areas to be improved in CMR cooperation and coordination. They will also provide recommendations to develop a strategy aiming at ensuring complementarity and coherence of efforts between humanitarian and military actors and deconflicting humanitarian and military activities. This draft road map for a common and more coordinated approach to CMR on the regional level will ensure a qualitative, rapid and effective humanitarian response.

c. Participants

To ensure a cohesive approach, the CMR Advisory Level Group (ALG) will bring together a selection of Movement, government, and civilian participants (including academia) that have expertise and influence on the evolving civil-military landscape and are committed to work together towards a coordinated approach. The IFRC, ICRC and other CMR Coordinators and focal points have been asked to provide a balanced number of advisors (subject matter experts) to participate in the 2-3 day workshop.

Moderators (TBD):

- IFRC – IDRL
- IFRC – Disasters and Crisis
- IFRC – Regional CMR
- IFRC – Global CMR
- IFRC Head of Country Cluster
- IFRC – PMER / Communications
- ICRC
- PIRAC
- BRITISH (UK) R
- CANADIAN RC
- AMERICAN RC
- NETHERLANDS RC
- CADRIM

Panelists (TBD):

- LTG USA (R) Ken Keen – TBC - in conjunction with LT Gral Floriano Peixoto Brazil.
- Dr. Walter Cotte - IFRC - Confirmed
- Sr. Guillermo Pacheco / Washington DC- Confirmed
- Referent RCRC Movement in Americas (AMCROSS) – Sam Tidwell - TBC

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- Referent from GVA IFRC CMR - Nelson Castaño – Confirmed
- Referent from GVA ICRC CMR - TBC
- Referent from DHL – Disaster Response Teams and GARD – TBC
- Referent from CADRIM
- Former Belize Forces Commander and CDEMA Rep. - BG Earl Arthurs – TBC
- Referent from US Southern Command J7/9 and Command Surgeon – TBC
- Referent from French Forces in the Caribbean
- Referent from British Forces in Caribbean – TBC
- Representative US Southern Command J7/9 – TBC
- Representative of Canadian Forces – TBC
- Regional Security Service (RSS) - TBC
- Referent from Netherlands Forces in Caribbean – TBD/C
- Referent from IADB (Inter American Defense Board) / IADC Inter American Defense College (IADC) - TBC
- OCHA – Chiara Capozio
- WFP – UN – Jorge Terrones and/or Mr. Michael Marx
- ECHO Representative for the Caribbean

Participants of the ALG CMR Group (TBD):

- RC Movement (NSs, IFRC, ICRC, PNSs)
- OCHA Representative LATAM –
- WFP CM Representative LATAM
- Governments
- Academic
- Regional representation of NGOs
- Regional representation of INGOs

d. Ways of Working – 5 Day Workshop

The workshop will have plenary sessions where thematic lectures will be given by experts, there will be group reflection sessions and other sessions will be held to design a roadmap for the construction and consolidation of the CMR Advisory Level Group (ALG) and the functioning of the Steering Committee (also round tables will take place discussing particular thematics).

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Workshop Agenda

- The draft agenda is in progress.
- This workshop will length approximately 25 hours and will be delivered virtually on November 27th to December 1st, morning sessions, AST.

Outcomes of the meeting:

- Generate a second Non-Binding CMR Regional Commitment – **The Americas Civil Military Commitment**
 - Continue with the CMR Advisory Level Group – Re-visit TDRs and regular meetings to review, assess and recommend changes in the civil military relations arena in our continent.
- e. **Considerations to be proposed during the workshop to generate a common ideal of the CMR Advisory Level Group**

CMR Advisory Level Group (CMR ALG)

About the CMR Advisory Level Group

History: The CMR Advisory Level Group (CMR ALG) was an idea that emerged in 2017 from a clear view of the RCRC Movement that there is a need to coordinate at all levels and in this case at the strategic level with actors and academies before, during and after disasters. These disasters can range from the Haiti earthquake in 2010, numerous major hurricanes in the Americas region such as Mitch, Mathieu, ETA and IOTA, and earthquakes such as the one in Mexico. The CMR ALG aims to improve and strengthen communication between all types of operators in the humanitarian space, including IOs, NGOs, Governments and relevant government disaster response department(s), Security Forces, the International Red Cross/Red Crescent Movement and civilian institutions.

During the second of these workshops in the Caribbean in 2021, the Civil Military, Government and Humanitarian Community was able to touch on various humanitarian issues in the Caribbean Region and in the Americas and as a result of this 3 day discourse and professional sessions the first CMR Caribbean Non-Binding Resolution drafted.

The IFRC will set the tone so that all actors in the field can coordinate before, during and after an event and any new tendencies in the civil and military arena are introduced and reflected. The CMR ALG should be composed of an equal number of humanitarian actors (including the RCRC movement), government



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response agencies, military and security agencies of nations in the region and connections with the UN Humanitarian Civil-Military Coordination Unit in OCHA. The CMR ALG should and will address some of the major humanitarian operations and dilemmas of our times, such as humanitarian space in countries with a difficult social and internal conflict type context, stabilisation operations whenever necessary, civil-military coordination in failed or close to failed states, civilian protection in dangerous nations with internal conflict, peacekeeping operations, CMR for COVID-19 response, etc.

Purpose/Role: The CMR Leadership Advisory Group is a neutral platform bringing together elements of Government involved in humanitarian response and crisis (OFDA/BHA, DFID, Ministries of Defense / Military Commands, FCO, and other important stabilization units/organizations in the region), with IOs, NGOs, the Red Cross Movement (Red Pillar), among others. It is initially chaired by the IFRC Regional and/or Global CMR Coordinators at first and the Chair will be rotated every meeting.

The CMR ALG meets bi-annually to discuss humanitarian crises and issues of policy, doctrine and/or strategy. Recently the CMR ALG has not held any meetings yet and we would like to utilize this opportunity to boost the start and set the precedent of the initiation of the group that should henceforth touch on topics such as CMR in Pandemics, Strategic Defense and Security in the Humanitarian Space, operations and access issues in all crisis and disasters and civil-military relations in the Climate change, CMR from a gender perspective, among other topics. We would like it so that every 2-3 years the CMR ALG hosts a conference with all interested stakeholders also considering the academia on a civil-military relations area of interest or theme and this to be held in a rotational basis within a region of the Americas Continent, beginning with the Caribbean.

The CMR ALG is a space for frank and open discussions about operations and policies, with the ultimate goal of improving humanitarian outcomes for people caught in crisis. It is hoped that the membership – consisting of mid-to-high/senior level practitioners and policy-makers – will be able to take the discussions back to their organizations and make efforts based on new information that will improve humanitarian outcomes.

The CMR ALG specifically serves as a Strategic Level Group to:

- **Convene:** The CMR ALG will be a recognized venue for experts to build knowledge, share information, and advance the dialogue among the humanitarian IO/NGO community and government civilian and military and security services / agencies.

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- **Consult:** The CMR ALG serves as a consultative mechanism for the crisis response community to exchange expert input on doctrine, policy guidance, operational procedures, etc., which effect the operational environment during humanitarian crises, relief, and recovery.
- **Communicate:** This group shares good practices and lessons-learned, identifies emerging issues and specific concerns, and communicates to policy makers, training /education community and implementers.
- **Collaborate:** The group also serves as forum for collaborative problem solving and prepares our respective organizations, pillars, and communities to engage effectively in complex conflict prevention, response, and humanitarian assistance and disaster response operations.

CMR ALG Terms of Reference

CMR ALG membership is open to strategic civilian, government, IOs, NGOs, security and military organizations that are involved in international humanitarian response.

- Organizations should be composed of tactical, operational, and strategic in humanitarian emergencies and present in contexts where civil-military issues are of critical importance.
- Organization or individual are well-engaged in civil-military debates.
- Organization or individual can guarantee consistent attendance. Absence of a period of 12 months or longer will lead to the revocation of membership.
- For the CMR ALG to serve as a neutral, impartial and independent convening platform, there needs to be balance between government, security forces, military, IOs, NGOs, national and regional response organizations and the Red Cross Movement.
- Human Rights organizations, media and the public are generally not included, except on an exceptional basis as observers and by invitation of the Steering Committee.
- Due to space and technological constraints, organizations should limit their participation to ideally one and not more than two people at a meeting.

Steering Committee

The direction of the CMR ALG is set by the Steering Committee, a group of the most active members of the CMR ALG and comprised of representatives of the RCRC (Red Pillar) UN (Blue Pillar), Military and Security Process (Green Pillar) and Government and Civilian Organizations/ Community (Purple Pillar). Specifically, there should / will be representatives from actors working in a Humanitarian Space during Disasters and Crisis. The Steering Committee is also chaired by the Regional and/or Global CMR Coordinators at first and this will rotate amongst the group.

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It is envisioned that the Steering Committee members will actively support and participate in the organization of the larger CMR ALG meetings. This support can be provided as:

- Intellectual investment (i.e., shaping the meeting's agendas, suggest items for discussion, sharing of information or read-ahead material, etc.).
- Provision of resources (specifically SME/speakers) and services.
- Hosting an CMR ALG meeting (co-chairing could also be an option).

The Steering Committee will meet regularly and approximately 6 weeks before each larger CMR ALG meeting/workshop. Steering Committee members can organize the CMR ALG meetings/workshop and lead portions of the meetings if they wish to do so. However, the Chair will remain with the Regional CMR Coordinators (of IFRC) to begin with until the first rotation occurs.

Acceptance of new members will be via the consensus (simple majority) of the Steering Committee and based on agreed membership criteria.

Ways of Working for CMR ALG Meetings: The CMR ALG meets quarterly and organizes a 5 day conference every two years. It is suggested that, from 2021 on, the CMR ALG will meet as necessary (disaster/crisis / mission dictates). Meetings will be limited to no more than 3 hours in length and will be held at the Regional and/or Global CMR Coordinators unless another venue is specified.

The CMR ALG can also provide a platform for other events different from the regular meetings, as long as they are organized in respect of the neutrality of the forum.

All CMR ALG meetings will be held under the Chatham House Rule. Minutes of the meeting will be provided by the IFRC CMR Team. A summary will be distributed to the CMR ALG members who have attended the meeting.

Ways of Working for Steering Committee: Any member of the Steering Committee or the CMR ALG general membership can nominate an issue for discussion. All suggestions will be discussed by the Steering Committee for inclusion on the CMR ALG agenda by consensus.