ALLIED COMMAND OPERATIONS

and

ALLIED COMMAND TRANSFORMATION

PUBLIC AFFAIRS HANDBOOK

OCTOBER 2014
Foreword

The face and pace of NATO’s operations have changed dramatically in recent years. Today’s complex and multidimensional security challenges require a comprehensive political, civilian and military approach for effective crisis management.

With the ever changing nature of the world’s geo political landscape and the concurrent explosion in communications technology, the Alliance’s need to communicate has grown exponentially. Allied Command Operations (ACO), Joint Force Commands (JFCs), Joint Task Force Headquarters (JTFHQs), and other NATO Force Structure (NFS) entities have to be prepared, before deployment and when deployed (among other efforts) to contribute to the Alliance message of commitment to working with all actors involved, in support of the overall international efforts in an operation or other military action.

To help streamline, standardise and synchronise NATO Military Public Affairs, ACO, with assistance from Allied Command Transformation (ACT), has developed the Allied Command Operations and Allied Command Transformation Public Affairs Handbook Version 2014. It is a ‘hands-on’ publication for NATO Command Structure (NCS) Public Affairs (PA) practitioners on how to conduct the Public Affairs functions of External Communications, Internal Communications, and Community Relations, focused on deployed operations. It expands on both ACO’s 095-001 “Allied Command Operations Public Affairs” and ACT’s 95-10 “Public Affairs Policy” directives, takes into account the substantial contribution of NATO member nations and subordinate commands and is to be considered an approved collection of tested tactics, techniques and procedures and best practices to guide and synchronise NCS Public Affairs activities at the strategic, operational and tactical levels of command.

The ACO/ACT PA Handbook is formatted for either A4 or A-5 sized printing. Updates will be posted on the Supreme Headquarters Allied Powers Europe (SHAPE) NATO Secret Portal for user access and SHAPE will disseminate updates periodically.

We hope you find this handbook a useful tool. To ensure that this Handbook meets the needs of the various commands we appreciate your input. Enclosure M explains how to submit changes.

Eric Bloom, COL (USA Army)  
Chief Public Affairs Officer  
Allied Command Operations

Mr Roy Thorvaldsen  
Chief Public Affairs Officer  
Allied Command Transformation

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1 There are many different and sometimes conflicting names for Public Affairs products throughout the Alliance. For the sake of simplicity and brevity, this document will use those terms in the Lexicon of Terms at Annex A to MC 0457/2 “NATO Military Policy on Public Affairs”. Enclosure L to this Handbook contains a list of acronyms.

2 This Handbook provides a variety of planning considerations, templates and examples for use at the strategic, operational and tactical levels. They are offered as both best practices and as a means of standardization of public affairs products and processes.
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Chapter 1

Introduction to Military Public Affairs in NATO

“The Parties to this Treaty reaffirm their faith in the purposes and principles of the Charter of the United Nations and their desire to live in peace with all peoples and all governments. They are determined to safeguard the freedom, common heritage and civilisation of their peoples, founded on the principles of democracy, individual liberty and the rule of law.”

– Washington Treaty, 1949

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1.1. **Mandate.** Public support for NATO’s missions and tasks follows from public understanding of how the Alliance makes a difference to international peace and security. Public confidence, in turn, is enhanced by NATO’s ability to achieve its mandate in a way that is open, transparent and consistent with member nation values and expectations. Military Public Affairs (PA) policy in NATO is derived from the higher principles of democracy that includes freedom of expression and of the media. NATO Commanders and Public Affairs Officers (PAOs) are bound by NATO policies to inform the public and by international law not to impede the media or freedom of expression.

1.2. **Military PA Mission.** Military PA is a function that contributes to mission success.

The mission of Military PA is:

“to support commanders by communicating accurate information in a timely manner to audiences to improve public awareness and understanding of the military aspects of the Alliance’s role, aims, operations, missions, activities and issues, thereby enhancing organisational credibility. Audiences can be allied, international, regional, local or internal, depending on the issue or activity.”

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3 NATO PA Policy MC 0457/2
1.3. **PA Policies.** It is vital to remember, however, that Military PA in NATO will not supersede the civilian public diplomacy leadership of the Alliance. Across all functions, NATO policy is directed first by the unanimous political consent of the 28 nations forming the North Atlantic Council (NAC) and then executed by the Secretary General (SECGEN) and International Staff (IS). From this framework, Military Committee (MC) Directives are developed by the unanimous consent of the 28 national Chiefs of Defence (CHODs). As Strategic Commanders, Supreme Allied Commander Europe (SACEUR) and Supreme Allied Command Transformation (SACT) then translate this guidance into command- level policies and direction and guidance for subordinate commands in the NATO Command Structure (NCS)/NATO Force Structure (NFS).

The relevant PA and Strategic Communications (StratCom) policies and directives are included in this Handbook as Appendices to Enclosure A. The NATO structure, policy and command and control are explained in Enclosure C.

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Note: PO(2009)0141, NATO Strategic Communications Policy; dated 29 September 2009 regarding coordination between the disciplines in the communication environment.

1.4. **SACEUR’s ACO Strategic Management Plan (ASMP).**

For Allied Command Operations (ACO) to remain relevant in a fast-changing world, it must be forward looking, adaptable, flexible and connected.

The world is more interdependent than ever, with global trends in the geo-political, economic, environmental, technological and social dimensions. These trends influence the security environment in which we operate, where there has been a rise in terrorism and extremism, asymmetric warfare and proliferation. Threats will remain complex, global and subject to unforeseeable developments.

NATO is required to provide forces that are deployable, expeditionary, agile and sustainable both within NATO countries and at strategic distance. We must ensure that the Alliance has all the capabilities necessary to deliver NATO Forces 2020 to meet the level of ambition and to operate together and with partners, within the future security environment.

The 2014-2018 period will set the path for ACO for the long-term future as we currently move from operational engagement to operational preparedness, with NATO's focus changing from a campaign to a contingency posture. We have
achieved Initial Operational Capability (IOC) and now we must move our focus to the accomplishment and implementation of Full Operational Capability (FOC).

ACO STRATEGIC MANAGEMENT PLAN 2014 – 2018
Dated 27 December 2013

1. **Mission.**

ACO fulfils NATO’s core tasks by providing early crisis identification; planning, preparing and conducting military operations; and co-operating with partners in order to contribute to the overall security and territorial integrity of NATO member states.

2. **Tasks.**

To accomplish the Mission, ACO has to conduct a number of explicit and implicit tasks and activities that are essential to support a visible deterrence posture, to maintain situational awareness, to detect emerging crises, and to contribute to Alliance security.

**Core Tasks.** The Core Tasks for the Alliance are Collective Defence; Crisis Management; and Co-operative Security.

**Permanent Tasks:** Deterrence; Strategic Awareness; Visible Assurance; Air and Missile Defence; Cyber Defence; Chemical, Biological, Radiological and Nuclear (CBRN) Defence; and Advanced Planning.

The Permanent Tasks provide an important contribution to Collective Defence but they can also contribute to the other two core tasks of the Alliance.

**Transition to FOC.** The implementation of the new NATO Command Structure (NCS) will continue until achievement of FOC, as defined by the MC⁴.

3. **Strategic Direction.**

   a. **ACO Vision.** As the integrated joint military command, ACO executes NATO’s crisis response measures and operations; fully accomplishes assigned missions and tasks; provides flexible and effective C2 with standing and deployable Headquarters; and improves readiness and interoperability of Allied Forces and Partners through training and exercises, while enhancing linkages with NATO and national force structure.

   b. **SACEUR’s Intent:**

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(1) I envisage ACO being a byword for military excellence, multinational cooperation and efficient use of resources. As the sword and shield of the Alliance, it will be focused on current and future operations and respond to the full range of potential missions in close co-operation with our nations, partners and their governmental organizations (GOs).

(2) In order to deliver mission success, in the face of significant structural reductions in the NCS. The critical path towards FOC has been captured within this ASMP. Achieving FOC will result in ACO reaching its new state of preparedness for future missions and tasks.

(3) In parallel, I intend to prepare and plan the achievement of ACO’s objectives looking beyond FOC, in close co-ordination with Allied Command Transformation (ACT) and my HQ Commanders, to ensure that ACO continues to fulfil its mission, reach its vision and match threats and challenges into future.

c. **Strategic Objectives.** In accordance with NATO Military Authorities (NMA) Strategic Priorities and Objectives, the ACO Strategic Objectives (level 0) are:

(1) Alliance Operations including permanent tasks are conducted in accordance with the defined objectives detailed in the operation plans and advice on Alliance Operations is provided.

(2) NCS and forces are prepared for current and future/contingency operations and FOC and defined readiness is achieved / maintained.

(3) The delivery of capabilities to meet current and future operational requirements is planned and related advice is provided.

(4) Non-member states and their forces, and non-NATO actors, are engaged to resolve potential crises through the Comprehensive Approach, and the participation of non-member states in Alliance operations is enhanced.

Note that the tasks required to accomplish the mission include communications tasks. At all levels throughout NATO, communications has become a major focus. The requirements and responsibilities on the PA community as advisors, operators, and planners will increase significantly. PAOs must strive to be credible and add value to the command and stay pro-active to provide commanders with what they need in a timely and precise fashion.

1.5. **Audiences.** NATO Military PA strives to interact with a variety of audiences, each with different concerns, levels of understanding and technology capabilities. The need to communicate effectively with a wide range of audiences is not just
desirable, it is essential to gain and maintain understanding and support for NATO’s operations. Some general categories of audiences include:

- **External Audiences** – all non-NATO entities, including the media and the general population.
- **Internal Audiences** – chains of command, families.
- **Third Party Actors / Key Influencers** – Think-tanks, Non-Governmental Organisations (NGOs).
- **Key Stakeholders** – Organisations, corporations with vested interest.
- **Theatre or Regional Audiences**
- **Adversaries** – those working to counter NATO efforts.
- **'Fence Sitters’** – those undecided and potentially waiting to be enticed or those who do not care at all.

NATO Military PA can communicate to these audiences directly, through third party advocates, or through the media, all of which may echo or dispute NATO messages in their reporting and analysis. It is important to understand that the media is both an audience and a medium by which Commanders through their PAOs attempt to reach a wider audience. PAOs must advise commanders on the best options to utilise the core functions of External Communications (includes Media Relations, Outreach, Internet & Social Media, Media Monitoring & Analysis and Imagery), Community Relations and Internal Communications and leverage various social media technologies and networks, imagery and training to derive the greatest effect when communicating actions and intent to the various audiences.

1.6. **Adversaries.** More than ever, NATO faces a ‘war of ideas’ which is being fought in the information domain. NATO’s adversaries use all the tools at their disposal to further their own objectives, trying to inform and persuade the international community that they have the moral high ground and that NATO does not. They use technology and speed to their advantage, often disregarding truth and accuracy in the process. Multiple adversary groups (perhaps sometimes opposed in overall intent) are often unified in their aims to discredit NATO and Western institutions. This collective can easily coordinate to erode public support for Alliance operations through the use of very simple, effective narratives which challenge the legitimacy of NATO objectives. Overcoming and combating these efforts with an Alliance of 28 national interests and perspectives is challenging and requires thoughtful, comprehensive planning and synchronised implementation of communications plans. This is the environment in which NATO commanders must conduct their missions. In a comprehensive approach to operations, enhancing public understanding and maintaining Alliance credibility are the two main efforts of the PA function.

1.7. **Maintaining Credibility.** In order to maintain credibility of the organisation, messages must be truthful, accurate, and timely. Messages must match the actions of the command throughout all levels. Discrepancies in messaging from a PAO or commander versus the actions of the troops on the ground or even more importantly, wrong actions taken by soldiers contradicting NATO messaging will immediately
erosed credibility. Messaging must be coordinated within the other information and communications staff elements and higher and subordinate HQs to ensure there are no conflicting events or actions and that messages are unified. Although NATO policy forbids PAOs becoming involved in planning or executing Information Operations (Info Ops) and Psychological Operations (PSYOPS), the policy encourages coordination to mitigate the risk of de-synchronisation.

1.8. Caveats.

a. Unity of Effort/Messaging within the Alliance. There is a special relationship between nations assigning troops to ACO missions and to NATO’s PA efforts. It is understood that nations have their individual national political and operational imperatives, but it is in everyone’s interest that NATO and the nations maintain unity of effort and unity of messaging regarding missions, activities, and the management of incidents. Lateral coordination between national capitals and Ministries of Defence is, by NATO policy, the role of NATO HQ. Military PAOs must understand their role in the political/military dynamic and not become involved in the political or diplomatic aspects of the Alliance. Military PAOs may on occasion engage in Public Affairs “Technical Network” (PA Tech Net) discussions with colleagues in national capitals when the circumstances demand it.

b. Advocacy of NATO PA Policy. Often, without proper understanding of NATO policy and the sensitivities of nations, and in a perceived attempt to streamline process and develop a staff hierarchy, commanders and influence activities practitioners within the command group will attempt to subordinate Military PA to Info Ops or StratCom. Although NATO Military PA Policy provides for coordination with these staff activities and functions, both NATO PA and StratCom policies are very clear that Military PA will not be subordinated and the senior PAO will have direct access to the Commander. The PAO must act as an advocate within the staff for these policies and should report through the PA channels to ensure compliance with NATO policy.
Chapter 2

Role of the PAO

“Public affairs must be well coordinated within the Alliance's military arm vertically through all levels of command and horizontally with national armed forces and other organisations working in parallel with NATO. Effective PA support to commanders including organisational spokespersonship requires that military PA be fully integrated into the operational planning process at all NATO HQs...”

– MC 0457/2

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2.1. **Introduction.** In order for a PAO to succeed within ACO/ACT, understanding the NATO environment and the opportunities and constraints placed upon the public affairs community is critical. NATO has prescribed policies and a framework within which a PAO must operate. The PAO must also be knowledgeable and sensitive to national policies which will over-ride NATO policies in most cases.

2.2. **Functions and Principles of NATO Military PA.** MC Policy Directive 0457/2 is the overarching policy for both Strategic Commands for PA. It is the Alliance agreed policy which drives PA in the Military Command Structure of NATO.

a. MC 0457/2 defines the Functions of NATO Military PA as:

   - External Communications.
   - Internal Communications.
   - Community Relations.

b. MC 0457/2 defines the Principles of NATO Military PA as:

   - Tell and show the NATO story.
• Provide accurate information in a timely manner.
• Ensure that information provided is consistent, complementary, and coordinated.
• Practice appropriate operational security.
• Conduct work mindful of multinational sensitivities, and respectful of the local and regional cultural environment.

c. National policies differ widely on many of these aspects and for a new PAO some of the policies prescribed by the MC might seem conservative, but they are unanimously agreed by all of the Alliance CHODs, and therefore are the definitive NATO doctrine for Military PA.

2.3. **Relationship to the Commander and Staff.**

a. MC 0457/2 states that Military PA is a commander’s responsibility. Commanders and staffs must communicate in a timely manner with the internal and external publics of NATO and non-NATO nations in order to gain and maintain understanding of the Alliance's objectives and missions. Ultimately, the commander sets the command’s tone for outreach and communications.

b. To assist commanders with this mandate, Chief Public Affairs Officers (CPAOs) are tasked with directing, planning, and executing Military PA in support of NATO operations or other activities under their respective commander’s direction and responsibility. The CPAO is the principal Advisor on PA within the command. As per MC 0457/2, AD 095-001, AD 95-2, and ACT Dir. 95-10, the CPAO will retain a direct reporting relationship to the commander and will not be subordinated to any other staff element.

c. PAOs must be able to ‘operationalise’ PA to be value added to the organisation. PAOs must integrate themselves and their staffs into every major aspect of the organisation and operation. PAOs should be closely tied to the major staff functions (i.e. Operations, Intelligence, Planning, CIMIC\(^5\), etc.) in order to maintain visibility on operations and other activities, to interject advice to the command group from the communicator’s perspective, and to remain proactive in integrating communications plans and strategies into the operational planning process. If the PAO remains separate from the rest of the staff, the PA efforts will always be reactive and will not sufficiently support the commander or the organisation.

d. The PAO, in addition to remaining integrated within the organisation laterally, must also integrate into the vertical command structure. The PAO should maintain frequent communication, both up and down the formal organisational PAO hierarchy, and remain a constant entity within the PA technical network (PA TechNet). Often, information is passed through these networks much faster than the traditional operations command and control

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\(^5\) Civil/Military Cooperation.
chain and can be very useful to not only the PA practitioners, but also the command and staff members. Maintaining situational awareness and sharing key information and guidance laterally and vertically is a prime example of the PAO adding value to the organisation.

e. The CPAO is the lead advocate for PA doctrine, training, manning and resources within the organisation. The PAO must be competent, knowledgeable, credible authoritative and proactive when advising senior leaders on PA, policy and strategies. The PAO must ensure that commanders and senior leaders are aware of NATO policies in order for them to make informed decisions.

2.4. **PAO Principle Duties.** To be effective, a PAO must be able to:

a. Provide expert advice to assist leaders in making and communicating decisions that affect the organisation’s ability to accomplish the mission.

b. In a PA capacity, integrate into and contribute actively and expertly to all key operational planning and staff function processes.

c. Employ the right communication tools, techniques and messages to link the command to its audiences, opinion leaders and media in order to promote public understanding and support.

d. Ensure readiness of the organisation’s PA personnel, resources and tools.

e. Act as the advocate for PA doctrine, manning, resourcing and issues within the command.

f. Coordinate PA activities, laterally and vertically, within the organisation’s area of responsibility (AOR).

2.5. **Military PA Relationship to StratCom and other Information Functions.**

a. In accordance with the overall StratCom direction from NATO HQ:

(1) SACEUR provides direction and guidance on StratCom within ACO, which includes military PA, Info Ops and PSYOPS. At SHAPE, the SHAPE StratCom Advisor is responsible to SACEUR for:

“…the development and integration of Strategic Communications plans in support of NATO current operations and ACO activities, in accordance with the overall Strategic Communications direction from NATO HQ; for the coordination of military PA, Info Ops and PSYOPS outputs in support of those plans and outputs; for overseeing the execution of the plans, in coordination with NATO HQ and subordinate ACO HQs.”

– NATO Strategic Communications Policy – PO(2009)0141
(2) Supreme Allied Commander Transformation (SACT) provides direction and guidance on StratCom within ACT, as well as StratCom concept and capability development in close coordination with ACO.

The PAO should look to StratCom for overarching strategic information objectives, themes, messages and coordination with other information activities within the headquarters. The CPAO should develop Community Relations (COMREL), External and Internal Communications plans that align with the overall objectives of the framework provided by the HQ’s StratCom Advisor.

b. Relationship to other Information Functions. As per NATO doctrine and directives, PA is forbidden from planning or executing Info Ops or PSYOPS. However, PA is expected to coordinate with the other information functions to support the overall commander’s objectives. The MC recognises that:

“PA and Info Ops are separate, but related functions. They directly support military objectives, counter adversary disinformation and deter adversary actions. They both require planning, message development and media analysis, though the efforts differ with respect to audience, scope and intent. All military information activities must be closely coordinated with PA in order to ensure consistency in the messages to external audiences and to promote overall effectiveness and credibility of the campaign. Info Ops is a military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other NAC-approved parties in support of Alliance mission objectives. PA is not an Info Ops discipline. While coordination is essential, the lines of authority will remain separate, the PA reporting relationship being direct to the commander. In addition, organisational arrangements must take account of the damage that can be done to NATO’s credibility if there is a perception that, through PA activities, NATO is attempting to unduly manipulate audiences or the media. Beyond coordination of efforts, messages and being informed of these activities therefore, PA will have no role in planning or executing Info Ops, PSYOPS, or deception operations.”

– MC 0457/2

c. To maintain the separation between PA and Info Ops the NATO StratCom Policy re-iterates, “there shall be no personnel overlaps during operations of staff designated for Information Operations on the one hand, and Public Affairs officers on the other.”

2.6. PA Relation with Spokesperson.

a. NATO policy directs commanders to be the primary spokespersons for the organization with CPAOs directed as alternative spokespersons.
b. Commanders have the authority to designate a spokesperson to speak on their behalf. In this situation, when an Officer other than CPAO is designated as primary spokesperson by the Commander, the exact relationship between the CPAO and spokesperson must be developed. There is no formal ACO policy guiding this relationship.

c. Organisations that belong to the NATO Force Structure (NFS) are not in the NCS. Unless involved in a NATO operation, personnel belonging to the NFS should not be identified as NATO spokespersons. Rather, they speak only for their own organisation, although they are welcome to explain the nature of the affiliation with NATO.

d. The relationship between CPAO and spokesperson is driven by:

(1) Rank. The general trend in NATO operations is to appoint a general officer from the operations career path to the position of spokesperson. In most cases, the Spokesperson will outrank the CPAO. As such, the CPAO will be expected to support the spokesperson to fulfil information requirements and, at times PA manpower might be required to accomplish the spokesperson’s mission. These are legitimate uses of PAO resources as they are furthering the commander’s communications objectives. It should be remembered, however, that NATO policy mandates that the PAO cannot be subordinated to any other staff officer.

(2) Complementing abilities. The CPAO and spokesperson shall develop a professional working relationship based on their own strengths and weaknesses, experience and personalities. There is little doctrinally which prescribes this, cooperatively and with the constant interests of the organisation and the objectives of the mission as the primary focus. 

(3) Commander’s direction. Ultimately, the Commander will determine how each staff position will be used. Once this decision is made, and providing it is not inconsistent with NATO policy, the Spokesperson and CPAO will be expected to work together to achieve the best possible results.

e. The CPAO and spokesperson must work hand-in-hand when developing communications plans and in the daily execution of media operations and outreach. Uncoordinated messages and conflicting information will immediately discredit an organisation.

2.7. **PAO as Trainer.**

a. PA Staff Training. The PAO must also ensure that his staff is trained and prepared to execute the PA mission. In this respect the PAO takes the role of mentor and trainer for the organisation. Likewise, the PAO must ensure the PA staff is resourced with the required personnel, appropriate tools and technology to accomplish the mission.
a. Service Member PA Training. Service member interaction with the media in contemporary operations is not only likely, but is encouraged as the best designated military spokespersons are often the men and women in uniform that are tasked to accomplish the mission. As such service members must be trained on how to interact with the media. The training will most likely be the immediate commander’s responsibility, but the PAO should be the advocate and subject matter expert (SME) for that training.

b. Senior Leader Training. The PAO, as the SME on communications, should advise the commander and staff on media awareness and interview techniques and presentation approaches.

c. Host Nation (HN) Mentoring. The PAO will, at times, be called upon to mentor HN and indigenous agencies. NATO operations are rife with examples where PAOs were called upon to train and mentor HN governmental PA agencies. In Afghanistan, for example, the ISAF PA staff was instrumental in standing up the Afghan Government Media Information Centre (AGMIC). In both Kosovo and Afghanistan, PA personnel are actively involved in planning and conducting training for their HN counterparts. PAOs should seek and be prepared for such tasks as the situation and higher headquarters direct.

2.8. **Unit Public Affairs Representatives (UPARs).** Whether a unit is authorised a PAO or not, the commander still has a responsibility to conduct a PA program. If a unit is not authorised a PAO in either its Peacetime Establishment (PE) or Crisis Establishment (CE), a prudent measure would be for a commander to appoint a UPAR to conduct PA duties on a reduced scale. The UPAR would be the liaison between the unit and the higher headquarters for PA issues. The UPAR can bring PA issues to the attention of the higher headquarters PA staff and can construct initial drafts of PA planning products, PA annexes, news releases, or talking points for submission for approval through the PA chain of command. As the UPAR is not a trained PAO and is most likely conducting these activities as an additional responsibility to his/her full time job, the duties of the UPAR should be limited and the higher headquarters should maintain situational awareness over any UPAR’s actions. Training UPARs is covered briefly in Chapter 7.

2.9. **PAO Responsibilities in Multi-national Environments.** The NATO CPAO has the responsibility to reach out and coordinate the PA activities within the organisation’s area of responsibility which includes NATO PAOs at subordinate headquarters, but should also be mindful of PAOs deployed in support of individual national contingents. PAOs of national contingents report and coordinate PA activities within national chains, and, because they are in a national chain of command vice a NATO one, may overlook the value-added that coordination with the NATO PA chain can bring. To increase the likelihood that national PAOs in deployed NATO operations are aware of NATO PA policies, guidance and messaging, NATO CPAOs at the deployed level should establish lines of communications with national contingent PAOs in the AOR. For example, if a NATO CPAO has three separate national contingents working within his region, the CPAO should habitually coordinate with these national contingent PAOs to gain situational awareness of their activities, inform them of the applicable NATO policies and
guidance, and provide situational reports to the higher headquarters, all the while coordinating efforts to maximise effects.

2.10. **Lessons Learned.** PAOs should make every effort to document and pass lessons learned to higher headquarters and to ACT in order to capitalize on both the positive and negative real-world and exercise experiences. This is a critical but often overlooked aspect which definitely makes an impact on future PA training and execution.
Chapter 3

PAO Planning and Staff Integration

“He who fails to plan, plans to fail.”

– Sir Winston Churchill

“In preparing for battle, I have always found that plans are useless, but planning is indispensable.”

– General Dwight D. Eisenhower, SACEUR 1951-52

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<td>Public Affairs Outputs</td>
<td>82</td>
</tr>
</tbody>
</table>

3.1. Introduction. Planning and preparation are key to success in any military operation. This is likewise true with Military PA. PAOs must develop detailed, easily understood plans in order to be effective. Those plans must be integrated with the command’s staff as well as the higher and subordinate headquarters.

3.2. Integration into the Command’s Planning Process.

a. The PA section must maintain an active presence in the various planning cells and working groups within the headquarters to ensure that PA is planned and integrated into all ongoing and future operations. This is critical to ensure that unity of purpose is met.
b. Early involvement of the Military PA function in the operations planning process (OPP) ensures that the commander’s PA intent is addressed and integrated into the operation. Early involvement will also ensure that the required resources are incorporated into the mission service support requirements. Transportation, security, access and other resources are rarely ‘owned’ by PA and must be allocated or tasked to support PA operations required to meet the Commander’s intent. Full integration into the staff and planning processes is the preferred method to ensure such assets are allocated.

c. Although Military PA and StratCom perform different functions, PA should complement StratCom plans to further the commander’s objectives. PAOs should also coordinate with IO and PSYOPS to ensure unity of message, but care should be taken to maintain separation from execution of Info Ops and PSYOPS. See MC 0457/2 for the MC’s direction.

d. The commander will always set the tone for the staff. The PAO should become a credible advisor to the commander, providing communications expertise and add value to commander’s decision making and staff planning processes. When this is the case, the Commander will direct to the other staff divisions to assist in accomplishing the communications mission. To this end, it is vital that the PAO win the trust and confidence of the Commander.

3.3. ACO PA Planning Policy.

a. Every NATO operation and activity under SACEUR’s authority must have a PA plan detailing the objectives of the Military PA activity, the intent of the programmed activities, the Military PA approach to be taken, and the tools and resources needed to communicate. The PA plan must support the overall mission objectives and SACEUR’s ACO Strategic Management Plan (ASMP). The PA annex will be put forward to the NAC for approval as a mandatory part of the larger Strategic Concept of Operations (CONOPS)/Operation Plan (OPLAN), or to SACEUR when it is part of an Operational CONOPS/OPLAN.

b. Tactical level CONOPS, OPLANs or operations orders (OPORDs) PA annexes will not be required to undergo the scrutiny of the NAC or SACEUR’s

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6 The Strategic CONOPS establishes SACEUR’s concept for the conduct of a NATO-led military operation, in concert with other non-military and non-NATO efforts, to achieve the NATO Military Strategic Objectives (MSOs) and conditions required to assist in the attainment of the desired NATO end state. The Operational CONOPS, developed in collaboration with the Strategic and Component levels, is the formal expression of the Operational level Commander’s intent for the conduct of the campaign or operation, including the deployment, employment, and sustainment of forces.

7 The primary difference between an OPLAN and an OPORD is that the OPLAN states critical assumptions that form the basis of the plan and time of execution is not introduced. These assumptions have to be revalidated to describe the situation awareness needed to transform the OPLAN into an executable OPORD. The OPLAN becomes an OPORD when the conditions of execution occur and an execution time is determined. An OPORD should include only such detail as is necessary for commanders of subordinate formations/units to issue their own orders and to ensure coordination. An OPORD may be written, oral, or graphical (traces, overlays, etc.), or a combination of these forms.
approval, but they will require approval from the next-superior level of command.

3.4. **ACO Planning Cycle.** There are numerous planning models and each nation’s process differs slightly. Currently, NATO abides by the Comprehensive Operational Planning Directive (COPD) version 2.0\(^8\) for developing Strategic and Operational level OPLANs in support of the NATO Crisis Management Process (NCMP)\(^9\). This process is used at the highest levels of NATO to drive political decisions to begin military planning and is beyond the scope of this handbook. It is important to perceive, however, that regardless of the specific planning model used, there are generally recognised steps in the planning cycle. Each planning model will use different nomenclature but the basic steps (and those of NATO’s strategic level planning) are included in a generic model as Annex 3-C.

a. As the title states, the planning process is a cycle just like other commonly used targeting models. Changes can only be made through critical feedback and analysis. That feedback is then used to re-adjust the plan. It is a continuous cycle. Evaluation should also look at the planning process to seek efficiencies within the organisation.

b. All planning models will generate certain products throughout their process, namely warning orders, OPLANs, OPORDs or fragmentary orders (FRAGOs)\(^10\). These orders are intended to inform subordinate commands of the key tasks, intent, and timings, early enough to begin parallel planning or to initiate the required actions. This information can be put out as paragraphs within the larger base order or can be disseminated as PA annexes to those orders.

c. The PA annex is designated as Annex TT in COPD. The template found at Annex 3-D provides the continuity and memory aides to address the important and relevant issues for PA planning.

d. Key to the success of PA planning is to ensure that the Military PA aspects are integrated and synchronised with the larger plan and that the PA plan is signed and issued through both the Operations and Command groups.

e. Military PA planning conducted purely through the PA TechNet or through informal agreements will not carry the weight of a legally binding order.

3.5. **Planning Hierarchy.**

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\(^8\) Dated 04 October 2013

\(^9\) The COPD can be adapted to the Component/Tactical level in order to enhance collaborative planning activity.

\(^10\) In rapidly changing situations commanders may not have time to issue full OPORD. Instead, a FRAGO, which is an abbreviated form of an OPORD, may be issued. The FRAGO will include only the parts of the original OPORD that have changed.
a. High level guidance. Generally, Military PA planning is informed by guidance from either or both of the following two sources: the Political-Military level or and the military Strategic Command level. In either case, the guidance may be provided informally through the PA TechNet, as a directive from the SECGEN or Strategic Commander or be published in a higher level PA strategy or StratCom framework. Often, however, initial requirements for Military PA planning are identified based on public environment and media analysis and/or identifying requirements as situations develop. Do not let the lack of formal guidance delay the initiation of planning for important PA considerations and issues.

b. Military PA Outputs. Based on the higher level guidance or the identified requirement, these outputs will take the form of a PA Strategy, PA Plan or PA Guidance (PAG). Each of these products should be directive in nature and provide clear and concise guidance, tasks and purposes and coordinating instructions for ease of understanding and unity of effort.

(1) PA Strategy. This document provides a broad Military PA approach that sets overall themes and goals for an organisation or initiative, and usually covers a longer term period. The strategy should include enduring themes and overarching messages. Action-oriented PA plans derive their guidance from PA strategies approved by higher authorities.

(2) PA Plan. PA plans are the details relating to the planning and conduct of a Military PA-related activity; in other words the ‘execution’ guidance detailing the “why, what, where, when, how and by whom”. A PA plan can also specify what needs to be done in year one or year two of a multi-year PA strategy, in effect ‘operationalising’ the strategy. On the operational level, a PA plan is presented in a five paragraph OPLAN or OPORD Annex format. When developing an organisational or institutional PA plan, the format is less formal and can be presented in memorandum or policy paper format.

(3) PA Guidance (PAG). A brief package of information provided as guidance to support the public discussion of organisational issues and events. Such guidance can range from a prescribed response to a specific question to a more comprehensive package. Included could be an approved Military PA policy, news statements, answers to anticipated media questions, and community relations guidance. The PAG also addresses the method(s), timing, location, and other details governing the release of information to the public. A PAG example is included at Annex 3-G.

(4) Messaging Products. Frequently, situations will dictate an immediate need for media response lines (MRLs), talking points (TPs), or lines to take (LTTs). These products do not constitute PA plans or PAG in that they do not address issues such as timings, coordination measures or provide issue context to the PA practitioner. Avoid the lure of merely providing such lines, in lieu of a formal, coordinated plan.
Conversely, a good PA plan or PAG will include these messaging products proactively.

c. **Advanced PA Planning.**

(1) **Specific Issue or Event Planning.** Events will arise that require separate planning. Examples might include changes of command, announcements for restructuring of headquarters, command directives, etc. These events may be tied into larger strategic issues but require focused attention in the short to medium term. Aspects of Military PA planning might include timings of media advisories, photographic and video support, news releases, media facilitation, preparation of Subject Matter Experts (SMEs) and handling of interview requests and development of TPs. Such plans may also be referred to as PAG.

(2) **Contingency Planning.** Anticipated events or problems that were identified during the planning process can be addressed in contingency planning. If for instance, an operation is conducted in an area known for earthquakes, the planners can develop contingency plans to deal with this event, should it happen. Having a plan 'on the shelf' will assist in rapidly addressing the problems which can keep such emergencies from developing into a crisis. Contingencies should be rank ordered by probability and by severity. From a Military PA standpoint, an event which has a very high likelihood of occurring but little to no impact on the operation or public opinion should be ranked as a low priority for planning. Conversely, high probability, severe events should get the immediate attention of the planners, including Military PAOs.

d. **Crisis Management Communication.** Unforeseen events occur. Sometimes these events are so serious or severe that they challenge the future or legitimacy of an organisation. For these circumstances, there is a need for managing the crisis before it becomes overwhelming. A detailed discussion of Crisis Communication Planning is included as Annex 3-K to this chapter.

3.6. **Higher and Subordinate HQ Coordination during the Planning Process.**

a. It is imperative that the higher HQ keep the subordinate commands informed of the planning progress to ensure that parallel and collaborative planning takes place. Without this critical step, the subordinate command could be taken by surprise and will have to quickly react to the higher HQ’s intent. A good rule of thumb is the ‘One Third, Two Thirds Rule’, in which the higher HQ will take one third of the time prior to the start of the operation to develop its plan. If, for example, an operation is to commence in 90 days the higher HQ would strive to complete its plan by day 30 to leave the remaining 60 days for the subordinate command and the subordinate commands below them to complete their plans. By providing as much information as possible through warning orders and open communication early in the process, the subordinate commands will have even more time and insight to ensure they
can fulfil the higher HQ’s intent and vision as well as, provide advice to the higher HQ if required.

Example Planning Timeline – One Third/Two Thirds Rule

<table>
<thead>
<tr>
<th>Begin Planning</th>
<th>Available Planning Time</th>
<th>Mission Execution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher HQ Allotted Planning Time</td>
<td>Subordinate HQ Allotted Planning Time</td>
<td></td>
</tr>
</tbody>
</table>

b. Within manning and resource constraints, PA planners should attempt to utilize liaison officers (LOs) as much as possible. Having a dedicated LO at either the higher or the subordinate HQ increases the possibility and effectiveness of communications dramatically. Even if the LO is only in place for critical planning events, the presence of a LO as a critical source of information for Military PA planning outcomes is most likely worth the effort.

3.7. Planning Considerations.

a. Regardless of the model, the following key questions guide all Military PA planning:

- Who is your audience?
- Why are you communicating? – what effect is sought?
- What is the overall environment into which you are communicating?
- What is your message?
- How are you going to tell it?
- When are you going to tell it?
- How do you measure progress or success?
- Are there security, privacy or other limiting factors?
- How does this fit into the overall NATO picture, the StratCom framework and how does it relate to Info Ops and PSYOPS plans?

b. Other planning considerations include:

- What are the PA Centres of Gravity (COGs) and the decisive points?
- What are the critical points that show public opinion or media environment is changing?
- Developing a ‘Public Affairs Collection Plan’ conducted by thorough research and analysis to identify shifts in trends. Changes in trends could dictate changes to plans.
- What assets are required? Assets could include dedicated combat camera, transportation, exception to policy for media to fly on military aircraft, download and transmission of images on military computer.
systems, establishing a policy to declassify operational footage for dissemination to media, etc.

- Developing a visual imagery dissemination plan. How will PA get images to the media and general public?
- What are the potential issues and who are the trusted SMEs to speak to these issues? Are they willing to speak, prepared to speak and available to speak at the decisive points?
- What are the national restrictions to the release of information, images, etc.?

Conducting a thorough Mission Analysis and Staff Estimate\textsuperscript{11} will allow PAO to accurately answer these questions.

The following annexes are provided as guides for the PA planning and staff integration process. They are written to provide continuity across ACO PA and as memory aides to draw the planners’ attention to the important aspects of PA planning.

\textsuperscript{11} In military terms an ‘Estimate’ is a command-led military problem solving process which is applied to ill-structured problems in uncertain and dynamic environments against shifting, competing or ill-defined goals, often in high stake, time-pressured situations. It combines objective, rational analysis with the power of intuition (a combination of experience and intelligence) and its output is a decision about a Course of Action (COA).

A Staff Estimate is essentially a functional area analysis tailored to support the specific Operations Planning Process (OPP) phase being conducted.

At NATO’s operational level the Staff Estimate is not to be confused with the Operational Estimate described in COPD. The Operational Estimate, guided by the commander, is a mechanism designed to draw together the vast amount of information necessary for the thorough analysis of a set of circumstances. It includes mission analysis, development and comparison of COAs and the recommended COA, leading to the commander’s selection of one COA to achieve the operational mission. To illustrate, at the operational level, early in the OPP functional area Staff Estimates commence with a collection and functional analysis of information to help the commander and staff understand the situation. Later Staff Estimates will be tailored to provide functional analysis in support of the determination of which COAs are viable and which one should be recommended.

At NATO’s strategic level the PA SME works integrated in a cross-functional staff structure organised in groups that develop the planning. At this level instead of an Operational Estimate the product comprises both SACEUR’s Strategic Assessment (SSA) and the Military Response Options (MROs), as a part of the Strategic Military Advice (SMA), which includes MC advice, submitted for NAC consideration in support of Political-Military Estimate (PME).

The SSA contains, among many other things, the key information factors to the crisis and the analysis of the strategic information environment (including consideration of potential target audiences, main actors in this environment and their networks, aspects of opinion building including key leaders, perception management and information flow, specific information systems and media, as well as, in coordination with J2, the status of own and adversary information activities), which will serve as a basis for developing and evaluating possible activities and effects in such an environment.

Once reviewed by the planning group at SHAPE the direction and guidance received from the NAC, MC and SACEUR, as well as many other factors as the desired end state, strategic objectives, limitations and assumptions, etc., the Military Response Options (MROs) are developed and the recommended MRO is submitted by SACEUR through the MC to the NAC.
Notes: 1. Following FAD receipt, SACEUR will release provisional CJSOR with ACTWARN to commence formal Force Generation.
2. As part of the collaborative planning process documents submitted to the MC will also be passed to subordinate Cdrs.
Annex 3-B Public Affairs Staff Estimate

The starting point for PA contributions to staff planning is the PA Staff Estimate. The PA Staff Estimate consolidates information on the mission audiences, media presence and capabilities, public opinion, PA assets and PAG. It also looks at emerging trends in media coverage; that covers everything from current events to internal and external communications issues. It requires PA Staff to conduct an analysis of any media including the news media and public environments that will affect or be affected by the mission. Based on those observations, PA leaders make recommendations on how to best employ PA assets.

This is not a static document created just for the beginning of an operation. It is a living document intended to maintain a record of the current environment in a theatre of operations or mission. It must be continually reviewed in order to reflect changes in the situational awareness.

The information contained in the estimate will feed the operational orders or plans and subsequent revisions of those products, if kept current and accurate.

Sources of information are not restricted to NATO documents. Any legitimate resource may feed this estimate.

The format and headings should be tailored to the specific operations. For example, stand-alone documents and reports may fit the bill for the information required in the estimate and therefore might be included and tabbed within a PA Staff Estimate binder. These might comprise TPs, themes, command messages and PAG with proposed questions and answers (Q&As) for engaging the media.

The following is an example of a PA Staff Estimate modified from the U.S. Army Handbook and Canadian PA planning suggestions. However, any other format could be valid as long as the estimate provides the data and information to make educated decisions within the planning cycle.

<table>
<thead>
<tr>
<th>PA STAFF ESTIMATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Mission.</strong> Restate the command’s mission from the PA perspective. This as analysis of the mission continues, will eventually become the Annex TT Paragraph 2.</td>
</tr>
<tr>
<td>2. <strong>Situation.</strong> This paragraph describes the operation’s strategic and operational media environment and identifies the critical factors that may affect the command’s mission.</td>
</tr>
<tr>
<td>a. <strong>Information Environment.</strong> Describe the general characteristics of the operation and the information environment in the area of operations.</td>
</tr>
<tr>
<td>b. <strong>Audience Analysis.</strong> Who are the audiences, both internal and external? What are their information needs? How do they get their information: television, radio, newspapers or word of mouth? Is the media state-run or independent? Does the audience population have telephones, cell phones, fax machines or Internet connections? These devices are frequently found even in developing countries and must be considered during the analysis of information channels.</td>
</tr>
</tbody>
</table>
c. **Media Presence.** What media representatives and organisations are in the area of operation? Are they radio, television or print? Are they state-run or independent? What is their political slant? Are they pro- or anti-Alliance? Are they receptive to Alliance information products such as news releases or other print or electronic products? Is the local media interested in live interviews with Alliance commanders and soldiers?

d. **Media Capabilities.** Assess the media's information collection and communication technology, specifically identifying their level of visual information acquisition and satellite communication capabilities. It includes an analysis of the logistics support, transportation assets, and host-nation communications infrastructure available to them.

e. **Adversaries’ Capabilities.** Assess the adversary's or adversaries' information strategy, information tactics and communication technology. Specifically identify their level of visual information acquisition, methods and means of disseminating information and purpose and intent of communications. It includes an analysis of the logistics support, transportation assets, and network communications infrastructure available to them. Info Ops, PSYOPS and J2 should be good sources of information.

f. **Media Content.** Assess the global media's presentation of information, agendas and emerging trends and analyse and prioritise the potential strategic and operational level issues confronting the command in the news media. This media content analysis will provide an evaluation of the quantity of coverage and the nature of that coverage for credibility, fairness and balance.

g. **Public Opinion.** What are the opinions/beliefs of the local populations; of the international community; of the Alliance members’ national populations?

h. **Information Channel Availabilities.** Assess the information channels available for communications in and out of the AOR. Identify the means available to the commander for receipt, transmission, and dissemination of voice, data, text, graphics, and digital visual imaging. Describes command, coalition, and local national facilities and equipment available, to include an analysis of available telephone lines for voice and data transmission, the accessibility of audio and video channels, the prevalence of private communications devices such as soldier-owned cellular telephones, facsimile machines, computers, portable radios and televisions, still and video cameras, and the nature and flow of the information possible through these channels.

i. **Information Needs.** Assess the information needs of the previously identified key publics. It analyses key internal and external audiences and assesses their news and information expectations. Identify the types of information made available to these key audiences.

j. **Filters.** Who are the key influencers? What are the key influences? What are the motivations and biases?

k. **Personnel and Resources Available.** What is the available PA force structure, translators, combat camera and/or administrative staff?
I. **PA Guidance.** What guidance has been received from higher levels?\(^{12}\) Official positions on theatre issues are naturally not developed at the tactical level. What is the theatre strategic/national command authority position? This is often coordinated and de-conflicted at all levels via conference calls and other communication means.

3. **Analysis of relative strengths, weaknesses, opportunities, threats (SWOT Analysis) of both friendly and enemy forces.**

   - Strengths: capabilities that enable PA to perform well. It is only a strength if it helps PA to meet its task.
   - Weaknesses: characteristics that prohibit PA from working well. Limitations or deficiencies in resources or capabilities.
   - Opportunities: trends, forces, events, ideas to capitalise on.
   - Threats: outside events or forces that PA needs to plan for or decide how to mitigate.

4. **Analysis of Courses of Action (COAs)\(^ {13}\).**
   a. Analyse each COA based on the PA objectives from higher HQ or political HQ.
   b. Indicate problems and deficiencies. At a minimum, subparagraphs should include media facilitation and support, news and information provision, and force training and support.
   c. Analyse each COA from a PA point of view to determine its advantages and disadvantages for conducting PA. The detail in which the analysis is made is determined by the level of command, scope of operations, and of urgency of need.

5. **Comparisons of COAs.**
   a. Compare each COA.
   b. List advantages and disadvantages of each COA under consideration.
   c. Include methods of overcoming deficiencies or modification required for each COA.

6. **Conclusions.**
   a. Indicate whether you can support the command mission (restated in paragraph from the PA viewpoint).
   b. Indicate which COAs you can best support.
   c. List major PA deficiencies, which the commander must consider. Include specific recommendations about methods of eliminating or reducing their effects.

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\(^{12}\) Until specific planning guidance from the commander becomes available, some assumptions may be needed for initiating planning or preparing the estimate. These must be clearly stated as assumptions. The assumptions will be later modified as factual data or planning guidance becomes available.

\(^{13}\) See footnote 7 for strategic level.
Annex 3-C  Military Planning Model for Public Affairs

Generic Model – Military Planning Cycle (Operational and Tactical level)

a. Receipt of the higher Commander’s Planning Directive with the mission. The mission might be directed by a commander or it might be an acknowledged need for future action.
   o Warning Order #1 (commander alerts subordinate HQ of impending mission and alerts to begin collaborative/parallel planning).

b. Research and Mission Analysis.
   - Update Staff Estimate
   - Analyse Higher Mission / Intent.
   - Identify Specified- / -Implied Tasks /-Essential Tasks.
   - Review Task Organisation /-Assets.
   - Determine Restrictions / Constraints.
   - Assess Risk.
   - Identify Critical Facts /- Assumptions.
   o Develop intent for PA.
   o Warning Order #2 (Initiate movement to preposition resources and personnel, guarantee logistics, establish timings, etc.).

c. Course of Action (COA) development.
   - Generate options.
   - Develop embed, media engagement or visual information plans.
   - Identify resource requirements.
   - Assign responsibilities.
   - Prepare COAs.

d. COA Comparison/Wargaming.
   - Identify resource shortcomings.
   - Compare COAs against intent and resources available.

e. Appropriate COA Selection.
   o Planning Directive to subordinate HQ (to trigger COA development at its level. It includes the refined COA, commander’s intent, final operational design, and subordinate HQ missions).

f. CONOPS development (with PA contribution and collaboration from subordinate HQ).

g. CONOPS approval by higher authority.

h. Plan development (with PA contribution and collaboration from subordinate HQ).

i. Plan approval by higher authority.
   - Approval authority accepts plan and authorises resources.
   o Warning Order #3 or PA Annex/PA paragraph in plan.

j. Plan implementation (execution).
k. Operations assessment: evaluate – take a self-critical look at how your plan was executed and determine what worked and what did not\(^{14}\). This feeds into the research for the next event, or can lead you to make a course correction to the current activity, if required.

l. Transition (new CONOPS and OPLAN for transition).

- **Tasks and considerations within the planning step.**
  - Product or Output.

## NATO’s Model – Military Planning Cycle (Strategic level)

### a. Receipt of the MC tasker for SACEUR’s Strategic Assessment (SSA).
- Strategic Warning Order (SACEUR alerts selected JHQ/CC and other appropriate ACO subordinate HQs to start collaborative planning and operational appreciation of the strategic environment).

### b. Develop and coordinate SSA.
- **Update PA Staff Estimate**
- **Review NATO political direction and guidance and policy statements.**
- **Develop a Strategic Appreciation of the crisis (nature, scale and scope of the problem and analysis of the strategic environment and the key factors\(^{15}\)).**
- **Analyse the principal actors and their roles in the crisis (capabilities and behaviour of these actors and their strategic COGs).**
- **Appreciate international interests and engagement in the crisis. (international legal aspects, international interests and objectives, international commitments, information environment, media and public affairs environment, international common aims, objectives and desired end state conditions).**
- **Determine implications for NATO, including potential strategic risks and threats.**
- **Appreciate potential strategic ends (including NATO end state, strategic objectives and effects), ways and means.**
- **Develop military considerations (applicability and use of military instrument and non-NATO interaction requirements).**
- **Coordinate and submit SSA to MC.**
  - SSA (with PA contribution).

### c. Receipt of the MC tasker for SACEUR’s to develop Military Response Options (MROs)\(^{16}\).

### d. MROs Development.
- **Review political guidance and direction.**

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\(^{14}\) The Annex OO (Operations Assessment) to the OPLAN contains metrics to allow activity (Measure of Performance, MOP) and results (Measure of Effectiveness, MOE) to be measured, as well as plan for collecting these data. Below the Operational level typically only MOP is measured.

\(^{15}\) Includes, among others, the key information factors.

\(^{16}\) NAC may also request through MC the development of MROs when requesting the SSA, if time constraints dictate.
• Appreciate lessons learned from similar previous operations.
• Select and develop MROs.
• Analyse, evaluate and compare MROs.
• Coordinate (includes advice from selected JHQ/CC) and submit MROs to MC.
  o MROs (with PA contribution).

e. Receipt of the NAC Initiation Directive (NID) with MC guidance for strategic plan development.
  o SACEUR’s Strategic Planning Directive (SPD) to selected JHQ/CC and appropriated subordinate HQs with guidance for operational estimate.

f. Strategic CONOPS development.
  • Coordinate and submit CONOPS to MC.
    o CONOPS (with PA contribution).

g. Strategic CONOPS approval by NAC.


i. Strategic Plan development.
  • Coordinate and submit plan to MC.
    o Plan (with PA contribution).
    o SACEUR’s Activation Warning (ACTWARN) or calling letter with provisional Combined Joint Statement of Requirements (CJSOR) to nations.
    o SACEUR’s Activation Request (ACTREQ) to confirm force contribution to nations.
    o SACEUR’s Activation Pre-Deployment (ACTPRED) to nations (if required).

j. Plan approval by NAC.

k. Receipt of the NAC Execution Directive (NED) with MC guidance.
  o SACEUR’s Activation Order (ACTORD) to nations.

l. Plan Implementation (execution).

m. Operations assessment: evaluate – take a self-critical look at how your plan was executed and determine what worked and what did not. This feeds into the research for the next event, or can lead you to make a course correction to the current activity, if required.

n. Transition (new Strategic CONOPS and OPLAN for transition).

• Tasks and considerations within the planning step.
  o Product or Output.

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17 The Annex OO to the OPLAN contains metrics to allow results (MOE) to be measured, as well as plan for collecting these data.
Annex 3-D  Public Affairs Research and Metrics

1. Introduction.

The very core objective of PA is to inform selected audience(s). But how does one know if this objective has been achieved? Has the message changed the audience’s beliefs, opinion, attitude or behaviour? Has the PA effort made a difference?

Key to answering these questions is first figuring out what the audience knows or says, often referred to as establishing a base-line from which to measure progress. Then, from that baseline, one can measure changes and adapt the plan accordingly.

Measuring progress must be based on facts rather than assumptions or ‘best guesses’. To acquire the facts, a PA staff must conduct detailed research specific to the operations environment. Western military cultural ideas about communication and credibility will not always apply in other parts of the world and sometimes not even within segments of their own population. Too often, communications strategies are developed on predetermined conceptions, cultural or political biases or general naivety about the particular environment. Western communicators often assume that experiences from their own environment can be overlaid against other cultures. This false assumption often leads to more serious problems and frustration on the parts of both the communicator and the audience. For this reason, it is vital that PA research and cultural awareness be conducted and acquired prior to launching a PA campaign.

2. Research.

Research can identify influential audiences and information needs, which will inform decisions such as appropriate messages, preferred delivery methods, and required intensity. The PAO must also evaluate or reassess the communications strategy to be able to refine and tailor the plan as things evolve or change. This feedback is processed and applied against measurable standards, or metrics to determine whether the plan is on track, whether it needs adjustments or if new dynamics have altered the situation. Unfortunately, most communications plans are based on a sense of unfounded intuition rather than any type of intellectually derived facts or data.

Research may be conducted to guide strategies for all three of the PA functions but each function will require slightly different approaches and resource allocation. For instance, researching the internal communications needs of an organisation might require a PAO to design and execute a simple, inexpensive research project himself/herself. Researching an external audience, perhaps speaking a different language, might require hiring a professional or culturally-attuned survey company to conduct opinion and behavioural polls. Conversely, relevant information may already exist through other academic or government research. That information might actually be more accessible than that of a local community or command.

As most PA budgets and resources will be very limited, conducting research might be difficult. If this is the case, consider seeking studies which have already been completed or seek other researchers who are willing to collaborate (also known as
‘piggybacking’ on another survey). Often, various International Organisations (IOs), NGOs or national organisations have collected data on particular environments. It is absolutely permissible to use secondary research (that research conducted by someone else) provided that research has been made available for the task at hand and the primary researcher is properly cited.

Based on these concepts, the PAO should ask the following basic questions before beginning the research cycle. The responses to these questions should then begin to frame the research plan:

- What is the communications/PA problem or challenge? (this might be left for the PAO to determine or it might be directed by the commander or higher HQ)
- What information is required?
- What is the priority of each category of information?
- How will you use the results of the research?
- What specific public, audience or environment should be researched?
- What research techniques should you use? (see the following discussion)
- How will the research results be analysed, formatted or applied to the plan?
- How much will it cost?
- How do we sustain the research effort to support the communications plan?

There are generally two categories of communication research – qualitative, that which deals with the socially constructed meanings, descriptions, perceptions and opinions, and quantitative, that which measures and collects numeric data to support PA planning. Together, they provide a more complete picture of a PA situation.

3. Qualitative Research.

a. “Qualitative researchers are interested in understanding the meaning people have constructed, that is, how people make sense of their world and the experiences they have in the world.” (Merriam, 2009, p.13) “Qualitative research involves an interpretive, naturalistic approach to the world. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or to interpret, phenomena in terms of the meanings people bring to them.” (Denzin & Lincoln, 2005, p.3) More simply, qualitative analysis allows the researcher to understand ‘why’ things are happening the way they are. Since qualitative research is conducted on a smaller, select audience, results should not immediately be assumed to apply to the whole, but can be used to identify or validate perceptions, social, cultural or value-based gaps, concerns, confirm assumptions or provide a reality check before, during or after the execution of a plan. Qualitative research outcomes can provide relevant and persuasive elements of knowledge for use in the PA plan. Qualitative research is normally done through focus groups or one-on-one interviews, (also called in-depth interviews).
(1) Focus groups are defined as “carefully planned series of discussions designed to obtain perceptions on a defined area of interest in a permissive, non-threatening environment. (Krueger & Casey, 2009) They are a way to get information about attitudes, beliefs, feelings and emotional reactions. With focus groups, there are no right or wrong answers – all ideas and opinions are important. The issue under review will drive who is recruited for the focus group but they will normally consist of a select ten to twelve people from a relevant audience who share a common characteristic or are homogeneous (gender, jobs, culture, etc.). The facilitator normally asks up to 12 open-ended questions with follow-ups (probes) for clarification or to elicit more specific information about how to approach or address issues or problems. For example, if the topic is a community relations issue, perhaps asking “How are military convoys affecting local business?” will be a good question to collect actual perceptions that may reflect the opinions of the broader community regarding this issue.

(2) One-on-one interviews are “interviews in which participants are encouraged and prompted to talk in depth about the topic under investigation without the researcher’s use of predetermined, focused, short-answer questions.” (Cook, 2008) They are “excellent tools to use in planning and evaluating […] programs because they use open-ended, discovery-oriented methods, which allows the interviewer to deeply explore the respondent’s feelings and perspectives on a subject. This results in rich background information that can shape further questions relevant to the topic.” (Guion & al., 2011)

For Military PA planning and research purposes, the goal of both these methods could be to develop a clearer understanding of those key audience members’ perceptions and what needs to be done to maintain, reinforce or modify these perceptions. Another aspect relates to the potential role some of the actors and stakeholder participating in the research be willing to play in supporting some of the outreach efforts included in the PA plan. Equally important is the fact that some individuals involved in the research effort if brought in from the beginning, will often take an active role in helping solve the problem.

b. Another common qualitative research method called participant observation is conducting planned observations which can tell the researcher ‘how’ people are doing things. For instance, a researcher might periodically monitor the habits of patrons in a café to determine how they gather their news. Are the patrons watching television news programmes or listening to the radio? Which stations do they watch or listen to? Does a particular programme or programme host then spur conversation or emotional reaction? These observations can lend useful insight into audience behaviour, thus informing PA decisions.
c. In addition to providing valuable insights into potential communication approaches, messages and activities, qualitative research will serve to indicate the level of understanding or acceptance for an issue prior to your communications effort. At the conclusion of a project or important activity, it is important to go back to the same or similar group to determine degree of success (i.e. did they hear or understand your messages, do they have a better understanding of the issues, did they change their perceptions, attitude or behaviour accordingly?).

d. Despite its proven usefulness, be aware of the limitations of qualitative research. For example, selection of interviewees and focus group members can skew the validity of the information collected and the results of the research analysis. Too often, interviewees are chosen because they will give the desired responses rather than provide insight into the real issues. Another drawback is that since qualitative analysis normally involves just a portion of the population or of a particular key audience, the results cannot be extended to the broader population; that is, the results are not ‘projectable’. For example, if you discuss a certain issue with selected community leaders, their opinions might not extend to the entire community; instead, it must be understood that these are merely opinions of a select group of people. Finally, 10 -12 relevant anecdotes or observations may not be regarded as adequate justification for commanders to make decisions. Pragmatic commanders may wish to see “hard data” prior to making or approving a decision. Despite these limitations, qualitative research is, if executed and structured properly is extremely useful for assessing perceptions and gaining an understanding of an audience’s main interests and priorities. When used in conjunction with relevant quantitative research methods, qualitative research can help the PAO gain a better understanding of the environment which will in turn help in making better communications decisions.

4. Quantitative Research.

a. The other category of PA research is quantitative research. This research is typically done through surveys, content analysis and experimentation.

In essence, the goal of quantitative research is to answer the question of ‘How many?’ With a sufficient, representative number of respondents, one may extend those results across an entire target audience. Surveys are typically how one gathers quantitative data and may be done in a variety of ways, each technique having merits depending on objective, time and budget.

b. Survey Development:

When developing the survey, ask to following questions:

(1) What type of survey will provide the information that I need?

(2) What medium is available and will that medium assist in gathering the information in a usable format?
(3) What are the priorities for each category of information? When developing the survey, list the most important questions first as the respondents will tend to pay less attention and give less detailed answers at the end of the survey.

(4) Is anyone else conducting research along similar lines? Whose data could compliment your research?

Generally there are four methods of conducting surveys; in person, phone, mail, and online. The survey effort does not need to be elaborate or complex. For example, concerns over traffic re-routing or the possible introduction of a new on-base service could easily be assessed with a simple survey. While surveying does take time up front, it can be time well spent when the PAO needs to make the case for or against the need to address an issue from a communications standpoint.

Strongly consider the use of on-line surveys for data collection. There are a variety of free survey websites, which explain step-by-step how to conduct the survey, generate and write good questions, develop distribution lists, and how to collate and interpret the data. On-line surveys can be a great asset for the PAO with little research experience working on a small budget.

A PAO can conduct a poll (a survey with a limited number of questions) to get a quick impression about attitudes on a very specific topic.

Each method has benefits and limitations. For instance, surveys sent through the mail typically have low return rates unless an incentive is included or the recipient is aware that the survey is coming. The entire process for a mailed survey (distribution, return and tabulation) takes longer than other methods because the respondents are driving the schedule, rather than the interviewer. If the survey is intended to identify the opinions of a specific demographic, it is necessary to include appropriate screening or profiling questions at the beginning of the survey.

c. Quantitative Sampling Methods:

The process used to define and select the sample will directly impact the validity of results. Since a sample is a representative group of a broader population, the more closely the sample reflects your population, the more valid the results.

When considering sampling options, the question to consider is how much confidence you need to be able to put in the results. You have two options: Probability Sampling or Non-probability Sampling.

(1) Probability Sampling or Random Selection. Random refers to the fact that anyone within that target group has an equal chance of being selected. This is important to consider if you want to project your results to a broader population. For example, phone surveys typically
select respondents randomly by geographic parameters. In a person to person survey, the researcher might approach every fifth or sixth person to ask him/her to participate. This ensures that every person in the target population has an equal chance to share their views.

(2) Non-probability Sampling. There are several approaches to non-probability sampling:

(a) Convenience Sampling. This method involves asking questions at a location convenient to the surveyor. An example might be asking questions just of those entering a medical clinic or entering a particular governmental building. If time or type of population limits who you can access, then convenience sampling might be the only option, but because this method limits the range of respondents, the information gained may not be an accurate reflection of the general population.

(b) Quota Sampling: may be used if you want to ensure your sample reflects a specific make up of a population – either by income, gender, education, etc. For example, if 43% of the large group is below 35 years old, then 43% of your survey respondents need to be younger than 35.

(c) Snowball Sampling: starts with a small group, asks those respondents for recommendations for more contacts, and builds from there. It is often used when not much is known about your population. Clearly, there is bias built into this approach, but if one is interested in responses from within a limited group (e.g., area business owners), then such an approach can be effective.

(d) Volunteer Sampling: is when respondents present themselves for participation. Pharmaceutical testing is done by volunteer sampling. Since motivations for participating often exist (usually money), results need to be carefully evaluated. Volunteers tend to have very strong views on topics and want their opinions heard.

d. Sample Size.

Budget and time are the major driving decisions when conducting surveys. To get the most representative sample within these two constraints, consideration needs to be given to two factors: confidence level and confidence interval (margin of error). Most surveys strive for a 95% confidence level with a 5 point margin of error.

(1) Confidence Level. If every person within a target group could be interviewed, you would be 100% confident that results reflected that group’s opinions. However, both budget and time usually prevent that approach. Instead, you need to settle on an acceptable level of certainty.
Typically surveys have a “95% confidence level” meaning that you have a sufficient number of completed surveys to be 95% confident that your results reflect those of the entire group. As expected, a 99% confidence level will require more surveys but may be needed because of the topic.

(2) Confidence Interval or Margin of Error. Another way to reflect potential uncertainty is to suggest that your answers are correct within a specific range. A range allows for predictions that the true answer falls within a high-low scale. The typical confidence interval is plus or minus 5 points (+/-5%).

Both factors considered together will impact on the number of surveys needed. The typical survey (with large population) relies on 95% +/-5 leading to 384 interviews required, however if more reliability is required the survey sample must be larger.

Online resources are available to determine the appropriate sample size. For example http://www.surveysystem.com/sscalc.htm provides a free calculator.

e. Question Types.

The design of the survey questions and how those questions are asked will also affect the quality of the data. For most surveys, questions will fall into one of two categories – close-ended and open-ended.

(1) Close-Ended Questions. In order to determine a sample’s preference for a specific list of options, you can offer ‘close-ended’ questions. These questions force respondents to pick specific answers over another. Examples of close-ended questions include:

<table>
<thead>
<tr>
<th>The military base’s traffic patterns delay my arrival at work.</th>
</tr>
</thead>
<tbody>
<tr>
<td>True ______        False ______</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Within the last 3 months, I have taken my children to the local health clinic for the following reason (Pick one. If more than one applies, pick most current):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minor illnesses ____ Check-up ____ Emergency needs ____ No visits within 6 months ____</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Please indicate your age range:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 25 ____ 25-40 ____ 41-55 ____ 56-70 ____ 71+ ____</td>
</tr>
</tbody>
</table>

Another type of close-ended question might use the Likert Scale. With this method, the respondent is asked scale his answers on the level of agreement, level of importance, or level of awareness.
NATO remains relevant in today’s security environment.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 ___</td>
<td>5 ___</td>
</tr>
<tr>
<td>2 ___</td>
<td></td>
</tr>
<tr>
<td>3 ___</td>
<td></td>
</tr>
<tr>
<td>4 ___</td>
<td></td>
</tr>
</tbody>
</table>

(2) Open Ended Questions. Are those which provide no options for the respondent to choose? The respondent will have to provide his own answers to the questions. The limitations to using open ended questions are that it is difficult to organise the answers without proper codification and that time, space, and a general unwillingness to write down a lot of information may hinder meaningful responses.

f. Interpreting and Using the Data.

The following steps will help in interpreting and using the data:

(1) Perform a broad overview of the data. A quick assessment of the responses might point out flaws in the returns. It might also help to develop an understanding of the trends and themes of the returns.

(2) Validity – Double-check the representativeness of your respondents – is this an accurate reflection of the population or did the respondents skew to one side or the other? This is where the profile questions come into play. For example, if you are doing a residents’ survey in support of a community relations program, ensure you (or the survey you are reviewing) have a spread of respondents likely to reflect the community. If you know that the community has a fairly even mix of ages but your survey has predominately seniors reflected, then that could have an impact on your analysis.

(3) Compile the data into categories. Does one thread of opinion dominate? Are the opinions equally dispersed? Common terms for interpretation follow and can assist in making sense of the data:

- Frequency – How many respondents gave a particular answer? What percentage?
- Mean or average – Considering all answers given for that sample, what is the average for the sample?
- Median – If ranked (high to low or vice versa), what is the response exactly in the middle?
- Mode – What is the answer appearing most often?

(4) Use the open ended comments as a ‘feeling’ for opinions. These comments might provide insight into the issues or good
recommendations to deal with them. If, for instance, survey findings suggest that local businesses are frustrated with convoys driving through the business centre, the PAO could use an open ended question to provide the commander with the respondent’s words. For example “One respondent noted that “the convoys ...” ”

(5) Clean the data – discard incomplete surveys or surveys in which the respondents were obviously not serious about providing genuine information.

(6) How do you want to use the data – do you want to focus on only the negative comments? Do you wish to merely measure the overall perception? This seems like a simple and obvious step, but deciding what to do with the data can be a very challenging debate.

(7) Did the survey achieve your objectives for the research? Did the survey perhaps identify other information requirements? Did your survey results provide the information you need to draw a conclusion?

(8) Draw conclusions and take action or revise the survey and try again.

g. Content Analysis.

Often, PA offices will present clipping services to the commander as a review of the media environment. These are merely a ‘copy and paste’ of various headline stories appearing the international or local media. Although making these available to the command group is beneficial in some respects, taking the effort to actually analyse the clippings can significantly guide the PA plan and provide the commander a much more valuable assessment. The various tools to analyse the news clippings are called content analysis. Content analysis is a quantitative tool to count and measure what the media are saying about the command or organisation. It is a way to measure the impact of messages, count the number of times PA output has appeared in the media, and most importantly, it allows the PAO to examine the tone, prominence, and placement of strategic messages.

There are a variety of methods to conduct content analysis and each has benefits and limitations in different situations. Not all techniques will be appropriate for every outreach effort. Additionally, the PAO may not always have to conduct his own content analysis. Online services exist (for varying fees) to perform the analysis.

Below are the categories and brief descriptions, in ascending order of complexity, of the various methods of content analysis.

(1) Clip Counting - Clip counting simply determines how many times your story ran. While a useful measure at the tactical level, such figures offer little insight into the impact of that coverage.
(2) Circulation and Readership Analysis - As part of this step, you would gather information such as circulation and audience profile to answer the questions of ‘Who?’ and ‘How many?’ It is important to keep in mind that not all outlets are created equal. A positive hit in a major international newspaper will often carry more weight than a similar length story in a smaller local paper. Likewise, wire services will carry a wide distribution.

(3) Advertising Value Equivalence - The Advertising Value Equivalence (AVE) approach asks the question “If I had to pay for this space, how much would it cost?” AVE allows for a comparison of media outreach efforts to advertising buys. In doing so, several factors need to be considered such as day of publication, placement (positioning) in the publication and length.

(4) While a helpful technique if advertising is an option for your effort, the AVE approach should be used reluctantly. AVE figures create the impression that advertising and communications outreach are equally effective, which is typically not the case.

(5) Placement Analysis - This approach requires the development of a list of characteristics to ‘define’ an article or story and associate values to those characteristics. Essentially you are looking for ways to visually differentiate one article from another. This does not consider the content; just the physical features. The list of potential factors to consider can be quite long, but examples would include:

- Front page placement?
- Above the fold? Picture?
- Black-white or colour?

For each of these criteria the analyst would establish criteria (e.g. front page above the fold -10 points, below the fold -5 points, article found on page 37 - 1 point). This data is then compiled and presented as a quantitative measure of how the messaging has been conveyed by the media, how important the issue is, etc.

(6) Prominence Analysis - Prominence Analysis combines the steps of the above Placement Analysis with the Circulation and Readership Analysis. For prominence, the assumption is that ‘bigger and earlier’ is better as suggested by the following list of factors to review:

- Publication or outlet.
- The values associated with various publications will be driven by goals of outreach (e.g., a national publication carrying a local story mention might not be as ‘desirable’ as placement in a local publication).
- Audience demographics; do those demographics match your key audience?
- Date of run (recognizes that readership/viewership varies by time period. For example, a story in the Sunday paper would get more ‘points’ than one run on Monday).
- Overall size of article; column inches or broadcast time.
- Where in publication/broadcast did story appear?
- Photography used.
- Size of headlines and with/without subhead.

As with other approaches, various factors would be assigned numeric values allowing comparison across a collection of coverage.

(7) Message Analysis – This is the first method for actually analysing the message rather than the placement. Essentially for this approach, the focus is on whether key messages and spokespeople made it into the story, and if so, where. Another factor to consider is how the message was included (implied quote by reporter or as an attributed quote).

As with the placement analysis, points are assigned for each message included in the coverage and its placement. Clearly the earlier key messages (or spokespeople) appear, the more valuable the coverage. A message buried at the end of the story is unlikely to reach most of audiences.

(8) Tonality Analysis - This is the first step in which subjective analysis comes into play to assess if the coverage was favourable or unfavourable. Typically articles are scored with a ‘positive, neutral or negative’ slant. Each article should be reviewed independently and then scores can be added together to assess overall impact.

Since tonality analysis is a subjective process, it is wise to ensure the analyst is not building personal bias into the review. A way to guard against this is to ask others to assess a collection of articles and discuss if and how each came up with their own assessment. If possible, it would be useful to have someone from outside the PA field review the articles as well.

(9) Overall Quality of Coverage - For this approach the analyst would combine several of the above techniques such as tonality, prominence and message inclusion. The values assigned by each of these techniques factor into creating an overall score for specific coverage. Such coverage can be done for individual placements or can be done over time to track overage of a broader issue.

(10) Competitive Analysis - Since no communication outreach effort occurs in a vacuum, it can often be very beneficial to compare what coverage the ‘competition’ is getting. When promoting one side of a
story, what coverage relays the opinion of those supporting the other side?

Often called ‘Share of Discussion’, this analysis reviews coverage from the audience's perspective: the public picks up the Sunday paper and reads your one ‘good’ story but also reads three others that do not support your position. Clearly your good news runs the risk of being overcome by the ‘competition’.

An easy place to start this competitive review is by counting clips and reviewing prominence. It might also be beneficial to conduct message analysis as a way of understanding how others are getting out their messages.

Understanding your issue’s share of discussion is one of the most critical components of providing communications support at the strategic level. If we limit ourselves to just reviewing our placements, we will miss a major part of the picture of how our key audiences – especially the public – are getting information about our situation. In addition, reviewing the competition’s efforts can offer valuable insights into what additional issues to consider for future communications or topics and what questions can be expected.

Such reviews can be done on ‘hot’ short-term issues as well as topics that run for several years.

The factors tracked and scored will vary by topic. For example, the tone of a ‘feel good’ story will be less useful to track than that of a policy-oriented story. Assigned values can be adjusted as well, but you need to ensure the same values are used throughout your review of a specific topic and are in keeping with your communication objectives.

h. Presenting Coverage.

Once the content analysis has been completed, the results must be presented in a way that facilitates decisions. In order to do this, the PAO must draw on the original purpose defining the research. For instance, the purpose might have been “To provide an indication of media penetration and analysis of the success of the command to asset its position on the NATO Comprehensive Approach.”

The next step would be to develop the analysis criteria. In this example, the PAO might choose:

- List command messages or positions to assess.
- Were the spokespeople quoted? What were their quotes?
- What was the journalist’s tone when covering the issue?
- What was the prominence of the story within the publication?
From these criteria, the PAO then develops a scoring protocol. For example:

- **Tone** - 1 (not positive) – 5 (very positive)
- **Placement** - 1 (poor placement) – 10 (positive placement)
- **Messages** - 1 (no msgs carried) – 10 (all key msgs carried)
- **Outlet** - 1 (outlet not critical) – 5 (critical outlet)

Each article on the issue is then scored.

### Example Scoring Protocol

<table>
<thead>
<tr>
<th>Date</th>
<th>Tone</th>
<th>Placement</th>
<th>Messages</th>
<th>Outlet</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Story 1</td>
<td>2</td>
<td>1</td>
<td>4</td>
<td>3</td>
<td>10*</td>
</tr>
<tr>
<td>Story 2</td>
<td>3</td>
<td>1</td>
<td>6</td>
<td>4</td>
<td>14</td>
</tr>
<tr>
<td>Story 3</td>
<td>4</td>
<td>3</td>
<td>6</td>
<td>4</td>
<td>17</td>
</tr>
<tr>
<td>Story 4</td>
<td>4</td>
<td>3</td>
<td>8</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>Story 5</td>
<td>5</td>
<td>2</td>
<td>8</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>Totals:</td>
<td>20+</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Story tone and placement scored low with this particular story. PAO will contact editor, discuss reasoning, and seek solution.

The format for presenting results is central to ensuring areas of attention are recognised and acted upon, if necessary. A quick approach to identifying coverage for discussion is to ‘colour code’ total points for each item reviewed. This will allow the PAO to show the content analysis findings and identify the actions to be taken to deal with any problems in news coverage.

Since low scores (red) are likely to generate questions, it would be helpful to include notes at the bottom indicating what is being done in response, if necessary. Low scores can obviously be the result of many factors, but one positive outcome of a negative article is that its content gives clear insight into potential arguments and messages that could be used by those on the other side of the issue. This in turn allows you to prepare responses and be proactive to prevent the ‘bleed’ of those messages into other outlets.

It is important to look, not just at the immediate impact of a particular news event, but also the long-term trends of the topic. There are a variety of software programmes which can easily assist in presenting this data to inform decisions. Likewise, there are a variety of services which can assist the PAO in developing the research plan. There are a myriad of services available which can provide research data free of charge of those registered accounts.

Print articles, social media platforms, chat rooms, television programmes and blogs are all media which can be analysed to understand how the media landscape is developing and can help in assessing the performance of a communications campaign.

5. **Conclusion.**
To make sound PA planning and good PA decisions, the PAO must know the environment he/she is dealing with. To do that, proper research must be conducted. This annex has provided a very brief overview of some of the approaches and methods of conducting research.

Information for this Annex was drawn from:

Dr. Maureen Taylor’s presentation to the United States’ Defence Information Schools’ Joint Senior Public Affairs Course, January 2010 and subsequent collaboration with SHAPE Public Affairs. Dr. Taylor is the Gaylord Family Chair of Strategic Communication at Gaylord College, University of Oklahoma. She currently teaches public relations at the undergraduate and graduate level as well as introduction to graduate study.

Bell, Ryan J.; How to Interpret and Analyze Survey Data; posted 25 July, 2008;


Annex  3-E   Public Affairs CONOPS/OPLAN/OPORD Annex TT

Guidance on drafting ACO PA CONOPS and OPLAN/OPORD Annexes.

1. The purpose for ACO to prescribe a PA Annex format is twofold. First, by using the approved format, the writer ensures continuity, in that NATO military officers will be familiar with the format and will understand where to find the vital information within that format. Second, this template serves as a checklist to ensure the PA planner has considered the important aspects and issues for PA operations.

2. The PA OPLAN/OPORD Annex is both a tool for conveying the details of the operation plan to the subordinate headquarters and a legally binding order signed by the commander responsible for the operation. As such, it should be concise, relevant and directive in nature. Additionally, the Annex is not a solitary document. The Annex cannot be developed in isolation from the base document – its major points should be included within the base document whilst also incorporating the major points of the base document into it.

3. The five main paragraph headings and bold subparagraph headings are mandatory. Plain text subparagraph headings may be omitted or supplemented as required. The important thing to remember is that the Annex must accurately describe the environment, state the mission and provide the details for conducting the PA and communication operation in a manner useful to other PA practitioners. Deviation from this format is authorised but not recommended.

4. If appropriate, use an appendix to provide the necessary detail required for a particular topic, rather than a paragraph in the base order. Appendices are often useful as standalone products or templates for subordinate HQs use. For instance, master messages or service member media cards can be included as appendices to distribute directly to the intended recipient.

5. Depending on the resources and staffing available to the particular NATO military headquarters drafting the Annex TT, higher headquarters assistance or contractor assistance might be sought in order to provide useful, knowledgeable and informed guidance to the subordinate command. Planning should not be conducted ‘in a vacuum’. Proper planning should be coordinated across military and political lines, up and down the chain of command and with the ultimate goal being unity of effort.
ANNEX TT TO
OPLAN XXX
DATED ......

OPLAN XXX
(TITLE of OPLAN)

PUBLIC AFFAIRS

REFERENCES:
A. MC 0457/2, NATO Military Policy on Public Affairs, dated 8 February 2011
B. AD 095-001, ACO Public Affairs, dated 4 June 2013
C. PO(2009)0141, NATO Strategic Communications Policy, dated 29 September 2009
D. AD 95-2, ACO Strategic Communications, dated 21 May 2012
E. ACO/ACT Public Affairs Handbook, dated October 2014

Time zone used throughout this order: ZULU

1. Situation. The situation paragraph consists of a brief general description of the communication situation, with emphasis on information particularly affecting PA operations such as the public environment in the theatre of operations i.e., positive to NATO, hostile to NATO.

Note: Consider a joint situation annex with the other communications disciplines in order to ensure unity of effort and to eliminate redundancy. Much of the information in the Annex TT is of interest to StratCom, Info Ops, PSYOPS and other communicators.

   a. Enemy forces / Opposing or Hostile forces.
      (1) Identify the threats to friendly PA efforts or success of the mission.
      (2) Describe the opposing forces’ capability/expertise in propaganda or media operations that will require specific counter-actions.
      (3) Outline any other threats to friendly communications efforts. The scope of this analysis will increase from tactical to strategic level.

   b. Friendly Forces.
      (1) Outline the higher HQ's PA and adjacent agencies' communications plans.
      (2) Identify any and all other forces or authorities in the Joint Operations Area (JOA) with PA capacity and/or capabilities and consider the required coordinative activities.
c. **Attachments / detachments.** Highlight critical elements of the task organisation that will provide additional PA capacity and/or capability e.g. subordinate NATO Media Information Centres or detachments of specialist staffs such as NATO TV crews or combat camera teams.

d. **Availability of local infrastructure to support PA activities.** For example, Internet infrastructure in place, Government/Joint/Multi-national Media Information Centres, etc.

e. **Media activity, both friendly and hostile.** Identify specific entities as well as trends and state how these will impact fulfilling the PA mission in theatre.

f. **Assumptions.** (If applicable). Planners must make assumptions when faced with a lack of information or uncertainties in order to further the PA plan. Assumptions must be plausible, necessary and realistic and should eventually be confirmed or denied to ensure that the plan remains valid.

g. **Any other information** relevant to the information environment.

2. **PA Mission.** A clear and concise statement of the PA mission, addressing the WHO, WHAT, WHEN, WHERE, WHY AND HOW of the PA element. State clearly, in simple terms, how the PA effort will support the commander in achieving his desired objectives. A clear task and purpose must be provided and the mission must be nested to both the owning HQ and the higher HQ StratCom and PA missions.

3. **Execution.**

a. **Commander’s PA Intent.** Clearly and concisely explain the commander’s vision of how Military PA activities will be conducted. This paragraph should make clear how much effort will be invested in PA activity. Include:

b. **Concept of Operations.** A detailed discussion of the overall PA mission, explaining how Military PA activities will be conducted in each phase of the plan and what the priorities, goals and objectives are. All of which should exist as a specific sub-task and purpose for each phase, detail them in an appendix if required.

   (1) PA Approach. Very Active, Active or Reactive (see MC 0457/2).

   (2) PA Purpose.

   (3) PA Priorities of Effort.

   (4) Desired PA end-state.

c. **Key Tasks.**

   (1) State the overall key tasks that must be accomplished.
(2) State tasks and purposes for each subordinate PA entity. Detail requirements for media operations and internal communications including but not limited to:

(a) development of PA plans;
(b) capturing, archiving and disseminating imagery (still and video);
(c) web site and social media web site management;
(d) media monitoring;
(e) building and maintaining relationships with local/ international media, third party advocates and other stakeholders (IO’s, NGO’s, etc.);
(f) producing internal information products for troops in theatre;
(g) media training for key leaders or service members.

d. Coordinating Instructions.

(1) Master Messages. They should be attached as an Appendix.

(2) Commander’s Critical Information Requirements (CCIRs). Identify types of PA information or events which may have an impact on the conduct of the campaign that the commander should be made aware of. PA recommendations should be integrated into the overall list of CCIR’s, which the staff presents to the commander for approval. These should not be separate and/or isolated PA CCIRs. Examples might include; inaccurate leader articles in influential media outlets, speeches by senior public figures (ministers and heads of state) of NATO and Troop Contributing Nations (TCNs) and public statements about the conduct of the mission by senior NATO figures or combat video that shows enemy of friendly forces actions which visually reinforce our messages.

(3) Release Authority. State who will have authority to release information and what coordination is required (attach an appendix with a release authority matrix if required).

(4) Synchronization and Timings. Examples include:

(a) Provide details of critical PA timings, synchronisation aspects or key battle rhythm events.
(b) Deadlines: indicate any critical deadlines/timings.
(c) Briefings: state how frequently these will be conducted by whom and any briefing materials that may be required e.g., CDs, briefing cards.
(d) Routine news conferences/briefings: state how frequently these will be conducted and by whom.
Sensitive Issues.

(a) Casualties/Accidents/Incidents. Describe the procedure to be used to coordinate the release of information on casualties. Be clear about the delineation of responsibility between national elements and NATO PA staffs. Address incidents involving CIVCAS (both HN and international) as well military casualties from more than one nation in a single incident.

(b) HN law. Describe any specific considerations that might apply to journalists or media operations activities as a result of HN law. If there is a NATO Status of Forces Agreement (SOFA) state whether its provisions would apply to journalists accompanying NATO military personnel into theatre and include it as a reference to this annex.

(c) Cultural/ethnic/religious issues (where applicable).

(d) Caveats. The Annex TT should specifically direct that caveats will not be released publically.

(e) Limitations on the use of images showing prisoners of war (Geneva Conventions).

Media Facilitation.

(a) Media Accreditation Procedures.

(b) Embedded Media Policies. State whether media will be embedded during the operation and if so how it will be accomplished.

Security. Both physical security and operational security (OPSEC). Include at a minimum:

(a) Reception, accreditation and identification of media: describe procedures.

(b) Reporting restrictions: state any restrictions that may be imposed on the media and why.

(c) Security review and how to clear or declassify documents and information for public release and/or use as PA products.

Liaison with other actors in the information community. Explain how the PA staff will conduct normal coordination and de-confliction with StratCom, PSYOPS and Info Ops.

Escort Officers: what training will escort officers be provided, who will supply them and who will brief them.

Specialist support: describe the requirements and arrangements for access to interpreters, translators and cultural advisors.

Strategy for coordination with civilian agencies, IOs, and NGOs?
4. **Service Support.**

a. **Concept of logistics support** for PA.

b. **Transportation.** Consider the following:
   
   (1) Transport of photographers and videographers.
   
   (2) Drivers, communications, integration into Higher HQ movement control.
   
   (3) Concept to move media through theatre and approval process/authorities, etc.
   
   (4) Prioritisation of media on intra- and inter-theatre transportation.

c. **Contracting and purchasing.** Consider the following:

   (1) NATO Contracting vs. National Contracting.
   
   (2) Process and Authority.
   
   (3) Local National hiring (media analysts, translators, cultural advisors).
   
   (4) Command Information printing and contracting.
   
   (5) Photo and video equipment.
   
   (6) Laptops and software for imagery editing.
   
   (7) Mobile or satellite phones.

d. **Briefing and Press Conference Support considerations.** Consider the following:

   (1) Conference room.
   
   (2) Maps, display boards, large screen TV monitors, overhead projectors, etc.
   
   (3) Interpreters, simultaneous translation equipment, transcription services.
   
   (4) Microphones, speakers, splitter boxes, etc.
   
   (5) Food and beverage costs.

e. **Other acquisition aspects** to consider:

   (1) Power supplies, voltage, conversion.
   
   (2) Stationary.
   
   (3) Petty cash.
   
   (4) Still and video cameras.
   
   (5) Printers and photocopiers.
   
   (6) Individual digital recorders (one per person in Media Ops/escort).
(7) Organic transportation (armoured or not) and its inherent requirements (drivers, security, maintenance, etc.).

5. Command and Signal.

a. Command.
   (1) PA Organisation. Will be detailed in an Appendix. Include an organisation chart of the relationship between PA and the Command Group/General Staff, J-Staff and other communications divisions.
   (2) Identify the chain of command and control, locations of the command posts and PA offices, succession of authority.
   (3) Include requirements for PA staff to liaise with their counterparts throughout the chain of command in order to develop coherent PA advice and recommendations.

b. Signal. Issues to consider include:
   (1) PA points of contact (POC) list, which includes name, rank, unit assigned, title/duty position, phone numbers (secure, non-secure, IVSN, VOIP, mobile, etc.), and email addresses, to include group addresses.
   (2) Integrated media use of communication assets. If integrated media are anticipated state clearly whether media may be permitted to file copy using military communications channels.
   (3) Computer integration, OPSEC, thumb-drive usage, etc.
   (4) Details on the use and acquisition of telephone lines (with international dial-out capability to communicate), mobile or satellite telephones, fax machines, telephone answering machines, etc.
   (5) Internet connectivity and computers with unrestricted access, mission secret computers, etc. Include the requirement for access to the ACO Open Source System (AOSS) for media monitoring (requires broadband internet connection).
   (6) Details for use and acquisition of satellite TV with international news channels.
   (7) Video transmission systems (DVIDS\textsuperscript{18} or similar system compatible with NATO requirements).
   (8) Commercial/Public radio monitoring facilities.

///Signature Blocks///

\textsuperscript{18} Digital Video and Imagery Distribution System.
APPENDICES:

1. **Background and public environment analysis** (general information about print and broadcast media, telephone system, Internet, social media, communication policy, etc.).

2. **PA C2 structure** – include as an appendix if not addressed in Paragraph 5.

3. **PA approach, goals and objectives, audiences and master messages.**
   a. **PA approach, goals and associated objectives by phase.**
   b. **Key Audience Analysis.**
      (1) Audience groups may be identified by; geography e.g. citizens of NATO member nations, interest group e.g. international think tanks/ICOs/NGOs, ethnicity or some other characteristic.
      (2) Audience groups need to be identified when different communications issues need to be considered.
      (3) It should be remembered that, in the age of the Internet and satellite television, messaging leaks across audience boundaries and must be consistent, relevant and appropriate.
   c. **PA Themes, Master Messages, TPs, Q&As.** Themes and Master Messages are overarching communication products that should in principle be enduring but may require different emphasis or even amendment depending on the phase of a particular mission. Mission specific messages should be related to audiences and derive from existing, higher level themes, master messages or guidance. TPs/MRLs/Q&As dealing with specific issues of the operations should be living documents and must be updated as the mission evolves or develops. The effective management of TPs, MRL and Q&A is a primary responsibility of the PA effort.

4. **Guidelines for release of information, media registration and ground rules, imagery support and casualty reporting.**
   a. **Media Accreditation & Ground Rules, Liability Waivers and PA Guidelines** (includes releasable and non-releasable information, report of casualties and any other sensitive issue).
   b. **Imagery guidelines.** At a minimum include:
   c. **Direction and guidance for acquisition of images** to support the communications plan.
   d. **Direction for archiving, meta-data and cut lines.**
   e. **Direction for transmission procedures and distribution lists** (ACO imagery websites, DVIDS, etc.).
f. POCs for assistance.

5. Any other appendix as required, e.g.:
   a. Daily and/or weekly reporting format, and any other required template.
   b. Service Member Media Cards. Include quick reference cards for NATO service members highlighting the important themes and messages and acceptable guidelines for dealing with the media.
   c. PA and Communications Battle Rhythm, taking into consideration Higher HQ and NATO HQ battle rhythm.
   d. Map of AOR with PA assets, transmission facilities, NMOC\textsuperscript{19}, NMICs\textsuperscript{20}, etc.
   e. Organisation of the NMOC and NMICs.
   f. Release Authority Matrix.

\textsuperscript{19} NATO Media Operations Centre.
\textsuperscript{20} NATO Media Information Centres.
**Annex 3-F   Public Affairs Plan and Example**

In some situations an Annex TT may not be appropriate to convey the details of a Military PA activity. In these instances, a more narrative-style PA plan is the alternative. This type of plan is typically used within multi-agency or multi-national events rather than the OPLAN or OPORD Annex TT, used when directing a PA plan within a particular command.

The format for an ACO PA plan is flexible. It must convey the major points of the plan in a clear, thorough, yet concise document in which the intended PA operatives and their supported commanders understand the objectives of the plan, key themes, timelines and expectations/responsibilities. A narrative-style PA plan may be used to cover the full spectrum of PA events, although the level of detail contained within the plan will vary according to the event. Strategic level plans tend to be more broad in nature while tactical and local plans will be much more directive. The situation dictates the level of detail. Regardless, a good narrative-style PA plan should cover the following:

- List applicable references.
- Background paragraph(s) which will inform the reader of the context/history of the issue, higher level perspectives, planning assumptions, and how the issue/event fits into the larger picture. Within this paragraph the communications problem should be defined.
- Intended audiences. An analysis of the various audiences is preferred.
- Objectives of the plan. Usually, but not necessarily always only from a communication perspective, what does the command or multi-agency taskforce intend to accomplish with this plan.
- Activities – list specific activities which will be conducted and describe how each assists in the accomplishment of the goal or objective. Group activities in support of specific objectives and by phase if there is a roll-out schedule over time.
- Other planning considerations – both vertical and horizontal.
- Explicit statements of the PA approach and a narrative concept statement.
- Critical timings and phasing.
- Responsibilities and guidance.
- Themes, Messages, TPs and/or Q&A’s (as appropriate).
- Measures of success or milestones to achieve.
- Any other key information, useful to the PA operatives or external agencies implementing the plan or coordinating additional actions.

An example PA plan follows. This example was the real world PA plan for the release of Gen. Stanley McChrystal’s strategic assessment in October 2009. This PA plan was socialised among NATO, Afghan and US agencies and highlights the
joint and multinational coordination required in Alliance operations. It gives a good indication of what a strategic-level PA plan might look like.
COMMUNICATION STRATEGY
COMISAF STRATEGIC ASSESSMENT
31 AUGUST 2009

1. REFERENCE

COMISAF Initial Assessment (TBP)

2. BACKGROUND

General Stanley McChrystal, the Commander of NATO’s International Security Assistance Force and U.S. Forces Afghanistan will issue his initial assessment to the USA Secretary of Defense and NATO Secretary General prior to the end of August. The assessment, which was directed by USA SECDEF and the NATO SECGEN, will review the existing situation, outline a revised implementation strategy and broadly address required resources. This classified assessment will have consequences for both USA and NATO leadership and will be of keen interest by the people and government of Afghanistan, as well as international and USA audiences.

3. OBJECTIVES

- To key USA and NATO audiences, explain and reinforce the continuing vital national importance of their international efforts in Afghanistan and how the new strategy will lead to enduring progress.
- Manage expectations with regards to GEN McChrystal’s assessment.
- Enable accurate and objective media coverage of both GEN McChrystal’s assessment and on-going political and military issues surrounding Afghanistan.
- Engage key publics via media and other public fora to:
  - Explain the process for dealing with GEN McChrystal’s Strategic Assessment. Note that the key budgeting and resource decisions and challenges related to operations in Afghanistan will come after the decision on the assessment/strategy.
  - Explain the strategy ISAF/U.S. Forces are employing as a viable way ahead for sustained but ultimately effective counterinsurgency operations in Afghanistan.
  - Reinforce and encourage continued commitment among ISAF-contributing nations.
  - Provide frank and clear assessments of the situation in Afghanistan – both the challenges and progress made to date.
  - Highlight the current status and planned growth of the ANSF.

4. PLANNING CONSIDERATIONS

Although originally directed by USA SECDEF, the additional request by NATO SECGEN requires consideration for how and when the assessment will be presented to NATO. GEN McChrystal will forward his assessment simultaneously to the Commander, USA Central Command, GEN David Petraeus, and Commander, Joint Force Command Brunssum, GEN Egon Ramms, who will endorse and forward through their respective chains of command. It is anticipated that several days will be needed for internal discussion of the assessment prior to any public discussion. Below is an approximate timeline (Encl 1) for major roll out events.
D-5: ISAF public affairs coordinates roll out plan for the assessment with USCENTCOM public affairs, the USA Office of the Assistant Secretary of Defense for Public Affairs, JFC Brunssum public affairs, Supreme Headquarters Allied Powers Europe public affairs, and the NATO Media Operations Centre.

D Day (Est: 31 Aug 09): COMISAF forwards assessment to Commander, USCENTCOM and Commander, JFC Brunssum.

D Day: ISAF public affairs release statement (Encl 2).


D+2: Commander, USCENTCOM and Commander, JFC Brunssum endorse and forward the assessment to USA SECDEF and NATO SECGEN, via USA Chairman of the Joint Chiefs of Staff, Supreme Allied Commander Europe, and Chairman of the NATO Military Committee.

D+2 to 10: USA SECDEF and NATO SECGEN review and brief their respective leadership. For USA SECDEF, anticipate National Security Council, key Congressional staff and the President of the United States. For NATO SECGEN anticipate the Permanent Members of the North Atlantic Council.

D+10: COMISAF briefs stakeholders on essential aspects of the Strategic Assessment (see Para 5).

5. STAKEHOLDER ENGAGEMENT

It is vital that key stakeholders – the Afghan, USA, and European governments, NATO, ISAF troop contributing nations, the United Nations, the European Union, and others – have a thorough understanding of the strategic assessment. To ensure this we recommend the following series of actions to brief key stakeholders on the essential aspects of the Strategic Assessment:

United Nations and Non-Governmental Organisations
ISAF will reach out to the UN and select NGOs to ensure uniform understanding of assessment content and implications for international forces’ efforts in Afghanistan.

Afghan Security and Ministry Spokespersons
ISAF Director of Communication and the ISAF Spokesperson will brief national security spokesman from key Afghan ministries (Ministry of Interior, Ministry of Defence, National Directorate of Security, Independent Directorate for Local Governance, etc.) and the Afghan Government Media and Information Centre staff.

ISAF Strategic Executive Group (SEG)
ISAF will add the assessment as an agenda item at an upcoming meeting. Note: This group includes spokesman from the European Union, United Nations, and key Embassy representatives (USA, GBR, NLD, DEU, CAN, etc.).
6. PA APPROACH

Following approval from USA OASD(PA) and NATO MOC, the public affairs posture is active using approved talking points from this plan (see Para 8).

7. QUESTIONS AND ANSWERS

Q1. What is COMISAF’s assessment of the current situation?
A1. The situation in Afghanistan is serious, but success is achievable and demands a radically revised implementation strategy, commitment and resolve, and increased unity of effort.

Q2. What is COMISAF’s revised implementation strategy?
A2. It is a renewed implementation of NATO’s comprehensive approach and ISAF’s mission to reduce the capability and will of the insurgents, support the growth in capacity and development of the Afghan National Security Forces, and to facilitate improvements in governance and socio-economic development.

Q3. Does the assessment include a request for additional resources?
A3. The assessment does not include specific recommendations or requests for additional forces - recent reporting on this topic is premature speculation. Any future force and resource requests will be considered separately and subsequent to this assessment and its approach.

Q4. When will COMISAF provide his detailed request for resources?
A4. During the assessment, COMISAF considered the current resources and troops he has available to task. COMISAF will state his resource requirements privately up his chains of command.

Q5. Will COMISAF request additional forces?
A5. It is premature to speculate on any additional requests for forces as COMISAF still must consider the impact of the operations of forces that are still arriving.

Q6. Will COMISAF’s assessment be released to the public?
A6. The assessment, while classified, can be discussed in general terms; however, there is no plan to release it to the public.

Q7. Has the Government of the Islamic Republic of Afghanistan seen COMISAF’s assessment?
A7. COMISAF personally discussed the essential elements of his assessment with various Afghan political and military leaders.

Q8. Was the Government of Afghanistan involved in the development of COMISAF’s assessment?
A8. COMISAF did meet with and seek the expert advice and counsel of our Afghan political and military hosts to determine how best ISAF can partner with and grow Afghan capabilities because ultimate success in Afghanistan will require an Afghan solution.
Q9. Does COMISAF’s strategy differ from current strategies?
A9. To a degree. The fundamental strategy to support the Afghan people remains unchanged; however the revised implementation strategy reflects a properly-resourced civilian-military campaign with a greater emphasis on counter-insurgency and a renewed implementation of NATO’s comprehensive approach.

Q10. Is success achievable?
A10. Success is achievable, but demands a radically revised implementation strategy, commitment and resolve, and increased unity of effort.

8. GEN MCCCRSYAL’S STRATEGIC ASSESSMENT TALKING POINTS

The situation in Afghanistan is serious, but success is achievable and demands a radically revised implementation strategy, commitment and resolve, and increased unity of effort.

The new strategy seeks to implement NATO’s comprehensive approach and ISAF’s mission to reduce the capability and will of the insurgents, support the growth in capacity and development of the ANSF, and to facilitate improvements in governance and socio-economic development.

The assessment does not include specific recommendations or requests for additional forces - recent reporting on this topic is premature speculation. Any future force and resource requests will be considered separately and subsequent to this assessment and its approach.

The Afghan people are the focus of this new approach.

Generally, the assessment outlines ISAF’s revised implementation strategy, which reflects an integrated and properly-resourced civilian-military campaign with a greater emphasis on counter-insurgency and a renewed implementation of NATO’s comprehensive approach.

Specifically, the assessment emphasizes reforms to get the basics right and a revised implementation strategy with a renewed focus on the people of Afghanistan as the centre of gravity. The essential reforms are:

- A primary emphasis in the operational culture to connect with the people.
- An expansion of and increased partnering with, and capacity of the ANSF.
- A prioritisation of responsive and accountable governance to improve understanding with the people of Afghanistan, relationships with regional partners, and partnerships with ISAF and the international community.
- An improved unity of effort and command.
- A geographical prioritisation of resources to where the Afghan population is threatened.
- Gaining the initiative and then evolving the operation in stages by strategically consolidating those initial gains as Afghan force capabilities grow, until sustained security occurs to where the achieved gains are durable.
As fundamental concepts of counterinsurgency, none of these reforms are necessarily new. However, as imperatives adapted to Afghanistan they will be radical to how we do business.

The reforms and approach require us to make an operational culture shift and not only change how we operate, but also change how we think.

9. POINTS OF CONTACT

Drafting Officer: (names and contact information)
Approving Officer: (name and contact information)

Encls
Proposed Public Statement by ISAF upon COMISAF’s Forward of the Assessment, dated 31 Aug 09.
### Annex 3-G  Public Affairs Guidance (PAG) Template

<table>
<thead>
<tr>
<th><strong>Letter Head for Responsible HQ</strong></th>
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</table>

<p>| <strong>Subject:</strong> | This is ‘chapter’ heading, such as Air Policing, KFOR, Partnership for Peace, etc. This is used for filing the individual MRL within a larger book. |
| <strong>Issue:</strong> | This is the actual topic to be discussed. For example elections, support to local government, manning issues, etc. This is not meant to be unduly restrictive; use as many as needed to ensure that the issues are dealt with appropriately. The major difference between the main information sheet and a sub-issue is totally discretionary. With use, this will become more easily defined. |
| <strong>PA Approach:</strong> | Include a brief concept for the scheme of release and posture (Very Active, Active, or Reactive) here. At times a phased approach might be appropriate. |
| <strong>Date originated:</strong> | Date of the original document. |
| <strong>Date/Time of last update:</strong> | Date and time become critical in an evolving issue. |
| <strong>Expiry date:</strong> | Latest date this MRL should be used without revision. If the MRL is to be revised annotate with the comment: Revise by (date). This should ensure that the info is timely and not overtaken by events. |
| <strong>To be used by:</strong> | This is where you define those allowed to use this information in responding to media. It should aim to be more permissive than restrictive. However, if the situation warrants communication by a single source, clearly annotate here. |
| <strong>Issue overview:</strong> | This is the context needed to understand the issue at hand, and the overall aim of any communications on the subject or issue. If the overview becomes lengthy or is better explained in a separate document, annotate and attach an annex. |
| <strong>Messages:</strong> | List the three main messages you wish to present to the audience. These messages should usually be nested to a higher level communications plan or commander's intent. |
| <strong>Talking Points:</strong> | This is where you can become more prescriptive in the communications about the issue. They should be concise, make a point, and be sufficiently complete to provide the spokesman with a script for the media engagement. |
| <strong>Questions and Answers:</strong> | Q&amp;As are useful for preparing for an interview and must reflect potential journalists’ questions. They are not meant to replace basic research on a topic; they are meant to trigger quick responses to obvious or dangerous questions. At a minimum, five positive and five negative questions should be prepared to reflect realistic media queries. Format the Q&amp;As as such: Q1. A1. Q2. A2. etc. |</p>
<table>
<thead>
<tr>
<th>Fact &amp; Figures:</th>
<th>Clearly state the PA posture for facts and figures. Some might be useful for an open audience, others might only be useful only if pushed or with a more knowledgeable audience.</th>
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<tbody>
<tr>
<td>Background and other Information:</td>
<td>This is the detail needed to understand the broader subject and why this has become a newsworthy issue. Include as much detail as needed for a spokesperson to understand and explain this issue. Consider adding old backgrounders as well if they help better understand the evolution of the issue. Use annexes if necessary. Website and hyper-links might be appropriate.</td>
</tr>
<tr>
<td>Officer of Primary Importance:</td>
<td>As the issue can rapidly evolve, provide names, phone numbers and e-mail addresses for the POCs for SMEs who can update the spokesman or validate that the data is relevant and current.</td>
</tr>
<tr>
<td>Author:</td>
<td>Drafter of the MRL with phone and e-mail contact. This person should effectively be the most knowledgeable PAO on this issue.</td>
</tr>
<tr>
<td>Coordinated with:</td>
<td>List POCs who provided input, validated or coordinated for release of the information.</td>
</tr>
<tr>
<td>Releasing authority:</td>
<td>Name, phone number and e-mail address of the releasing authority. This should be the CPAO or higher.</td>
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Annex 3-H  Visual Information and Imagery Planning

Reference: MC 0457/2, Paragraph 42 (Imagery).

The demand for imagery, to include still, video, surveillance and gun camera video, has increased in recent years as social media, imagery repositories, Websites, and other technological advancements have proliferated. PAOs cannot request photos in a reactive manner or employ photographers with minimal guidance and expect to receive images of the right quantity, quality or, most importantly, content. Likewise, merely sending a photographer to an event or operation does not provide him/her the guidance to address deadlines, transmission requirements or release authority of the images.

To address these requirements, PAOs must develop imagery collection and dissemination plans and ensure they are included in operations plans. On the macro level, these plans are addressed in organisational Standard Operation Procedures (SOPs) and appendices to the PA Annex. On the micro level, they are stated by detailed task and purpose by the photography team’s supervisor.

Regardless of the level, the PAO must state the task, purpose, requirements and expectations, while ensuring realistic means to transmit and disseminate the images are in place and coordinated vertically and horizontally. Without expressed direction and resource planning the subordinate commands, staff officers and photographers will not know the command’s expectations.

Consider the following factors and comments when developing an Imagery Plan:

<table>
<thead>
<tr>
<th>HQ Objectives</th>
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<td>• What are the HQ’s objectives and how can imagery support these objectives?</td>
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<td>• If the HQ’s objectives are heavily reliant on public perception of information outputs, did the HQ weight the public affairs and imagery collecting effort with the appropriate resources?</td>
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<tr>
<td>• Is the command’s emphasis on imagery and its declassification and/or release known and understood by the rest of the command? Do they understand their role in supporting the imagery plan (J-3, J-2, J-6, J-4, Air transportation planners, etc.)?</td>
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<tr>
<td>• Are the above mentioned considerations included in any official order, SOP or policy letter to empower the PAO to leverage assistance?</td>
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<tr>
<td>Audience</td>
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| • Who are the intended audiences and how do they receive their information?  
• Which medium(s) is the most appropriate for addressing these audiences?  
• Are there agreements, restrictions, cultural taboos, ground rules or ethical issues which should be considered when developing the imagery plan or which should be addressed as instructions to photographers?  
• In what format will the audience view the imagery (PAL, NTSC, jpeg, etc.)? Include this information to ensure the photographers and staff officers/NCOs understand the format requirements. |

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<tr>
<th>Intent for Imagery</th>
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| • Are there specified tasks within the OPLAN or OPORD for imagery? Whether specified or not, what are the implied tasks which will require imagery support?  
• How will the imagery be presented or published?  
• In what format should imagery be submitted? |

<table>
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<tr>
<th>Timing</th>
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| • Is the imagery to be disseminated immediately, archived for later use or released as part of a phased operation?  
• Are the images time-sensitive? Is the photographer required to transmit images from the field and, if so, does he have the capability?  
• Who is responsible for receiving, embargoing and safeguarding the images if they are to be used in a phased operation? |

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<tr>
<th>Resource Network</th>
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| • What agencies or equipment are available to co-opt support from (national, Alliance, embassies, ministries, regional commands, higher HQ, HN, IOs, GOs, NGOs, etc.?)  
• Who can assist and what is their contact information? (i.e. NATO Military Audiovisual Working Group, NATO Media Library [http://www.nato.int/multi/photos.html] and Defence Imagery [http://www.defenseimagery.mil/index.html])  
• If there are gaps in resources, develop solutions and recommendations to overcome the deficiencies. Provide the recommendations to the appropriate HQ or action officer.  
• Where are the nearest DVIDS facilities and who are the POCs? ([http://www.dvidshub.net/](http://www.dvidshub.net/)) |

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<tr>
<th>Reception Plan</th>
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| • Who is the responsible party on the ground to receive the photos/video?  
• How will they process or edit the images?  
• What is the intent for the images after reception? |
### Propriety
- What are the considerations for images of detainees, persons under arrest or prisoners of war? This could vary by nation according to its interpretation of the International Laws of Armed Conflict.
- What are the considerations for images of casualties, friendly, enemy, civilian?
- Are there copyright issues? Some nations restrict the release of photos. Generally, higher headquarters can assist with this if informed of the problem.

### Classification and Declassification
- Who will initially assign a classification to the images?
- Who can authorise the declassification of the images?
- What is the process for declassification?
- What is the means of identifying then declassifying Unmanned Aerial Vehicle (UAV) footage or Weapon Systems Video (WSV)?
- What is the process for identifying the UAV or WSV footage as useable? Will the PAO have the authority or will this be a commander’s call?
- Note: Some nations have very specific photo restrictions on equipment and especially on photographing Special Operations Forces (SOF) personnel so the national considerations have to be observed.

### Transmission Plan
- What are the methods available for transmitting imagery (DVIDS, .ftp, Internet, photo repository website, etc.)?
- Who are the POCs for each method?
- Are there bandwidth issues which must be addressed prior to the operation?
- What are the passwords or access codes for using each of these resources?

Note: DVIDS is the primary repository of imagery to be available to the media. Other Internet based photo and video repositories are authorised but will be used secondarily to DVIDS. ACO commands will maintain active credentials to use the DVIDS functions.
Liberal use of NATO TV is also a highly recommended.

### Release Authority
- What is the scheme of authority for release of the imagery?
- With which agencies will coordination be required prior to release of images (higher HQ, subordinate HQ, multi-national, joint, HN, NGO, etc.).
<table>
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<tr>
<th>Define mission complete End State</th>
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<tbody>
<tr>
<td>• How does the PAO define “mission complete” to the photographer? Does the photographer understand that the mission does not end, for instance, until the photos are edited, captioned, VIRIN numbers assigned, uploaded/archived and/or transmitted? Without expressing these expectations the photographer may not comprehend the PAO’s expectations. Confusion in these matters could jeopardise achieving the command’s intent.</td>
</tr>
</tbody>
</table>
This is an example of an annual communications strategy template. It is intended only to introduce a concept of laying out a series of media engagements, matching objectives and themes across a year-long period of time. ACO is not prescribing this particular template, but presents it as “food for thought.” This time of matrix can be easily created in Word, Excel, or PowerPoint.

<table>
<thead>
<tr>
<th>Quarter</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
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</thead>
<tbody>
<tr>
<td></td>
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</tr>
<tr>
<td><strong>Month</strong></td>
<td>Jan</td>
<td>Feb</td>
<td>Mar</td>
<td>Apr</td>
</tr>
<tr>
<td><strong>Major Events</strong></td>
<td>Political</td>
<td>Military</td>
<td>Social</td>
<td></td>
</tr>
<tr>
<td><strong>Desired Effects</strong></td>
<td>1.</td>
<td>2.</td>
<td>3.</td>
<td></td>
</tr>
<tr>
<td><strong>Engagements</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Themes and Messages</strong></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
Annex 3-J Resource Acquisition in NATO


For NATO, new equipment and capabilities are either provided through national means or are submitted for approval through the CROs Capability Delivery Process. This process is executed to ensure that NATO money is spent prudently, efficiently and effectively.

The process allows for headquarters at any level to identify a capability and then, through staffing up the headquarters chains, ensures that the capability can be integrated into other systems, does not cause unnecessary redundancy and is appropriately prioritised for funding.

Once a capability is identified it must be documented and submitted through the respective headquarters (i.e. if the tactical/operational headquarters PAO shop identifies the requirement, it must be submitted through that headquarters). From that point, it will proceed through the following series of boards and committees to develop the scope of the project, align the capability within existing capabilities and resources, and identify the funding methods:

- Operational Requirements Review Board (ORRB) – Tactical/ Operational HQ.
- Crisis Requirements Coordination Board (CRCB) – Permanent Operational HQ.
- Crisis Management Requirements Board (CMRB) – SHAPE/ACO.
- NATO Office of Resources – NATO HQ.
- Infrastructure Committee (IC) – NATO HQ.
- Contracting – HN or Appropriate HQ.
- Implementation – HN or Appropriate HQ.
- Capability Delivery.

Note that this is a revolving and very time consuming process to make sure that NATO is not wasting money on systems that cannot ‘talk’ to each other, negate effects of other equipment through frequency conflicts and fit into the larger, longer term plans. The flow of the process will start at the level which identifies the requirement, flows through the ACO headquarters, to NATO HQ, and then back down the military chain for the actual contracting of the equipment or services. This process encompasses the entire J-Staff in addition to the advocates of the requirement at all levels of the chain of command.

Decisions on common funding, host nation sponsorship and other financial matters are considered at the NATO and SHAPE levels. These decisions are out of the purview of the operational level PAO. The operational level PAO’s main responsibility is to focus on writing a clearly defined requirement with a valid justification and on coordinating with the higher headquarters so they can push the request through the process.
2. **Crisis Urgent Requirement (CUR) Checklist.**

Once the capability is identified take the following actions. Recommendations are also included to ensure that the requirement is properly and effectively staffed:

- Submit the requirement via the CUR and the Requirement Summary Sheet (RSS) formats. Examples of these forms are included in this Annex.
  - Request a capability rather than a piece of equipment. Example – request a system or data base to accredit media with the ability to categorise journalists’ personal information, photo, etc. rather than requesting a laptop, computer, and passport photo camera. This will allow more flexibility when contracting.
  - The CUR should be written as a stand-alone defence of the requirements. This is the argument which will compete with all other requirements for money and time. Reference doctrine or direction when possible.
  - The CUR should be written clearly, concisely, and precisely. It should be simple enough for non-native speakers to understand yet still be powerful enough to explain the requirement when under scrutiny.
  - Coordinate with your counterparts at the higher headquarters. Establish contacts with the project officers at the higher headquarters levels, as they will be the champions of the request through the staffing process.
  - Submit the draft CUR and RSS to your SHAPE and JFC counterpart. These officers offer a good perspective, provide continuity and have experienced the process. They are a useful sounding board and can provide great insight into developing the resource requirement.

- Submit the CUR and RSS to the Operational Requirements Board (ORB) at your HQ and be prepared to defend the requirement throughout the process.

- Follow-up frequently with the ORB Secretary. Just as turbulence affects the PAO staff, the personnel responsible for the ORRB, CRCB and CRMB change frequently as well. Frequent follow-ups will ensure that they are aware of your priorities. Do not be afraid to ask for their help. They are the experts on the process.

- Ensure that you have a method to pass the request to follow-on colleagues. Most service members are assigned to the operation/mission for a short duration and may not see the CUR come to completion. Be sure that replacements are briefed on the individual requirement, justification, status and process. Continuity is vital.
3. **Example of CUR.**

**CRISIS RESPONSE OPERATION URGENT REQUIREMENT (CUR).**

Date: 16 December 2008  
To: Secretary CRCB  
Subject: Portable Simultaneous Translation Equipment for ISAF HQ PAO.

References:

A. HQ ISAF PAO ISAF/PAO/1204 – Background CONOPS  
B. FRAGO 376-2008 (Security at regular GMIC Press Conferences)  
C. SG(2006) 0160-REV1 Revised Funding Arrangements for ISAF

### SECTION 1: REQUIREMENT IDENTIFICATION

1. **Originator Number:** 220/ISAF/OPS

   a. **Requirement Definition Owner:** ISAF HQ PAO – Deputy Chief Media Operations

2. **Action/Authorising Officers:**

<table>
<thead>
<tr>
<th>HQ/COM</th>
<th>Responsible Division</th>
<th>Action Officer</th>
<th>Authorised By</th>
<th>Authorised On</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISAF HQ</td>
<td>PAO</td>
<td>Lt CDR J. Gater, ISAF HQ PAO Deputy CHIEF Media Ops</td>
<td>Capt. Mark Windsor GBR, N, Ch PAO</td>
<td>16 Dec 08</td>
</tr>
<tr>
<td>JFCBS</td>
<td>PAO</td>
<td>Valentin Poponete, SO Media Relations ISAF</td>
<td>Capt. Meiert (DEU Navy), Ch PAO</td>
<td>05 Jan 09</td>
</tr>
<tr>
<td>SHAPE</td>
<td>PAO</td>
<td>Lt. Col. Wright, W (USA-A), SO PAO</td>
<td>Col. Derek Crotts (USA A), Ch PAO</td>
<td></td>
</tr>
</tbody>
</table>

### SECTION 2: REQUIREMENT DEFINITION

3. **Details of the requirement**

   **(1)** **Urgent Requirement Definition:** Purchase of an integrated ‘simultaneous translation kit’ to enable the simultaneous translation of COMISAF media engagements.

   **b. Location of Works:** PAO Building, ISAF HQ, Kabul (but capable of being transported to various locations such as Embassies and the Government Media Center).

   **c. The scope of work includes:** The procurement of 1 x portable audio system allowing COMISAF to be translated, simultaneously as he speaks, into up to five different languages to an audience of up to 50 personnel, listening with wireless headsets. System must:

   **(1)** allow COMISAF to communicate through up to five interpreters simultaneously translating into five different languages to a maximum of 50 members of the audience.
(2) be portable (must fit into the back no more than two SUVs to be transported to the various press conference sites - GMIC, MOI, MOD, COMISAF office, etc.)

(3) be wireless to avoid bulk, avoid excessive set up time and mitigate tripping hazards

(4) be easy to set up, operate and maintain - personnel fluctuation at ISAF mandates ease of training and operation.

(5) run on 230V power - must run at ISAF HQ and the Government Information Centre.

(6) will be used to transmit information to an open source audience.

d. User of the Capability: ISAF HQ PAO in support of COM-ISAF

e. Military Justification:

(1) Justification: Simultaneous translation equipment is needed to facilitate COMISAF media and key leader engagements held in up to five differing languages (Dari, Pashtu, Farsi, etc.).

(a) System will replace existing use of ‘one-after-the-other’ translation which halves the available media contact time. Current system is very slow, tedious and does not use COMISAF’s time effectively or efficiently.

(b) ISAF PAO holds mission essential COMISAF, General Officer, Ministry and Regional Command press conferences and round table discussions eight times per month in a variety of locations to include ISAF HQ, Government Media Center, various embassies, etc.

(c) The system must be portable in order to be moved in the organic PAO up-armored SUVs.

(d) Renting is not a cost effective or reliable option. Rental systems costs 1100 euro for six hours. Used at least 8 times a month, the system covers the costs in less than one year. Renting the system is not flexible enough for the very fluid events occurring in theatre. COMISAF has been called upon to conduct very short notice emergency press conferences regarding important events or incidents, making it impossible to find one for rent at short notice.

(e) This capability has been specifically endorsed/approved by COMISAF.

(2) Impact of Failure: Currently, press conferences, round-tables and other media engagements can only be conducted with consecutive translation across multiple languages, thus doubling meeting times and severely reducing the effectiveness of such meetings. For example, in a recent COMISAF round-table with Afghan journalists, only 45 minutes was available in the commander’s programme; due to the need for translation and the number of attendees, there was only time for each media outlet to ask one question. This is a waste of COMISAF’s valuable time and has a negative impact on our mission

4. Technical Considerations for the Requirement: The portable wireless audio system to facilitate simultaneous translation is an ‘out-of-the-box’ kit that will operate with local Afghan supplied power. This stand-alone capability will not interface with any other ISAF HQ equipment now or in future.

5. Duration of the Requirement: Duration of ISAF mission.

6. Standards and Interoperability: System must be stand-alone, requiring only external 230v power.
7. **Other Special Requirements:** Nil

   (1) **Constraints:** System must be portable, wireless, easy to set up, operate and maintain and run on 230V power.

8. **Precedence considerations:** Extremely Urgent. COMISAF endorses this new capability which is vital to the ongoing success of the mission as soon as possible.

**SECTION 3: LINES OF DEVELOPMENT**

9. **Lines of Development:**
   a. **Doctrine:** No Change
   b. **Training:** Nil required.
   c. **Personnel:** Nil required.
   d. **Equipment (CIS and Non CIS):**
      (1) **CIS** – Nil.
      (2) **Non CIS** - one (1) portable Simultaneous Translation Equipment set is now required
   e. **Organisation:** No Change
   f. **Infrastructure (Real Estate and Civil Works / Electronic):**
      (1) **Real Estate and Civil Works:** Nil.
      (2) **Electronic:** Nil
   g. **Information and Interoperability:** Nil
   h. **Logistics:** O&M costs are not expected to exceed 2000 EUR for re-charging, battery and spare part replacement.
   i. **Security:** For the translation/transmission of UNCLASSIFIED material.

**SECTION 4: IMPLEMENTATION AND TIMELINES**

10. **Implementation:**
   a. **Host Nation (HN) Recommendation:** SHAPE
   b. **Responsibility for Design:** Nil.
   c. **Responsibility for Implementation:** SHAPE delegated to JFCB or further delegated to HQ ISAF P&C office. Deviation authority requested to authorise the delegated Financial Controller the authority to approve the appropriate procurement deviations necessary to award the contract in a timely manner.
11. Staffing and Implementation Timelines:

<table>
<thead>
<tr>
<th>Template Time line</th>
<th>Action</th>
<th>Estimated Time</th>
<th>Actual Time</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requirement</td>
<td>Endorsed by ORRB</td>
<td>16 Dec 08</td>
<td></td>
<td>E-day</td>
</tr>
<tr>
<td>Definition <em>(5 Weeks)</em></td>
<td>Endorsed by CRCB</td>
<td>15 Jan 09</td>
<td></td>
<td>Aim E+2 Weeks</td>
</tr>
<tr>
<td></td>
<td>Endorsed by CMRB</td>
<td></td>
<td></td>
<td>Aim E+4 Weeks (+1 week for CG)</td>
</tr>
<tr>
<td>Request for APF</td>
<td></td>
<td></td>
<td></td>
<td>If necessary</td>
</tr>
<tr>
<td>Cost Estimate <em>(4-12 Weeks)</em></td>
<td>TBCE Submitted to NOR</td>
<td></td>
<td></td>
<td>Estimated date must be verified by the Host Nation / NOR.</td>
</tr>
<tr>
<td></td>
<td>Authorisation* <em>(2 Weeks)</em></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Contract Award</td>
<td>70 days after IC approval (timeline can be much shorter if Deviation is approved; 11c above)</td>
<td>Estimated date must be verified by the Host Nation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>IOC</td>
<td>30 days after contract award</td>
<td></td>
<td>Estimated date must be verified by the Host Nation.</td>
</tr>
<tr>
<td></td>
<td>FOC</td>
<td></td>
<td></td>
<td>Estimated date must be verified by the Host Nation.</td>
</tr>
</tbody>
</table>

SECTION 5: COST ESTIMATE AND FUNDING VALIDATION

12. Cost Estimate: one (1) portable Simultaneous Translation Equipment set is estimated at less than 50000 Euro.

13. Requirement Initiation and Funding Validation:
   a. Has this requirement been initiated or have any funds been committed for this requirement? No
   b. Any request for special consideration for early initiation and/or committing of any funds? No, but very high priority for ISAF HQ and has been endorsed by COMISAF.
   c. Is this requirement a part of any Development Plan (Infrastructure/CIS): This is a companion directive to the initiative detailed in Ref B.

Eligibility and/or Rationale for NATO Funding: The cost of this MMR cannot be attributed to any single nation, being in support of ISAF HQ and its’ Crisis Establishment. Simultaneous Translation Equipment sets for CE personnel and equipment for HQ elements are eligible for common funding in accordance with Ref C. This equipment will be employed by a multinational PA office in order to better provide information to a multinational media audience.
4. Example of Requirement Summary Sheet (RSS) for CMRB.

<table>
<thead>
<tr>
<th>SHAPE, 23/02/2009, CUR Number: 220-ISAF-OPS</th>
<th>SHAPE Lead Division and Project Officer: PAO, LTC WRIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Subject: Simultaneous Translation Equipment for ISAF</td>
<td></td>
</tr>
<tr>
<td>3. Originated by: LTC WRIGHT, W (PAO)</td>
<td></td>
</tr>
<tr>
<td>4. SHAPE Lead Division and Project Officer: PAO, LTC WRIGHT</td>
<td></td>
</tr>
<tr>
<td>5. Date introduced to CMRB: 15 FEB 09</td>
<td>6. Date assigned to Lead Division and staffing time in SHAPE: 15 JAN 09</td>
</tr>
<tr>
<td>7. Definition of the Requirement:</td>
<td></td>
</tr>
<tr>
<td>- ISAF requires a simultaneous translation system that will allow COMISAF to communicate through up to five interpreters simultaneously translating the speaker’s words into five different languages to a maximum of 50 members of the audience.</td>
<td></td>
</tr>
<tr>
<td>- Equipment must be portable (must fit into the back an SUV to be transported to the various press conference sites - GMIC, MOI, MOD, COMISAF office, etc.)</td>
<td></td>
</tr>
<tr>
<td>- System should be wireless to avoid bulk, avoid excessive set up time and mitigate tripping hazards</td>
<td></td>
</tr>
<tr>
<td>- System should be easy to set up, operate and maintain - personnel fluctuation at ISAF mandates ease of training and operation.</td>
<td></td>
</tr>
<tr>
<td>- System should run on 230V power.</td>
<td></td>
</tr>
<tr>
<td>- System will be used to transmit information to an open source audience.</td>
<td></td>
</tr>
<tr>
<td>8. Does this Project represent only the MMR (reference)? Yes (SG(2007)0464 – Action Plan on NATO’s Strategic Communications (5 Jul 07))</td>
<td></td>
</tr>
<tr>
<td>9. Military Justification: COMISAF requires this equipment to effectively communicate the ISAF objectives and actions to the local, regional and international media in Afghanistan in support of:</td>
<td></td>
</tr>
<tr>
<td>- Comprehensive Strategic Political Military Plan to Guide NATO’s Engagement in Afghanistan (3 Apr 08)</td>
<td></td>
</tr>
<tr>
<td>- SG(2007)0464 – Action Plan on NATO’s Strategic Communications (5 Jul 07)</td>
<td></td>
</tr>
<tr>
<td>- MC Dir. 457-1 – NATO Military Policy on Public Affairs</td>
<td></td>
</tr>
<tr>
<td>- ACO strategic Communications Directive 95-2 (5 Mar 08)</td>
<td></td>
</tr>
<tr>
<td>- NAC ISAF Strategic Vision (3 Apr 08)</td>
<td></td>
</tr>
<tr>
<td>- ISAF Theatre Communications Strategy.</td>
<td></td>
</tr>
<tr>
<td>10. Cost Estimate: (when required) Under 50K EUR</td>
<td></td>
</tr>
<tr>
<td>11. Associated O&amp;M costs: (when required) replacement batteries and spare parts; Under 2000 EUR per year</td>
<td></td>
</tr>
<tr>
<td>12. Is this project eligible for Common Funding (reference)? SG(2006) 0160 REV-1</td>
<td></td>
</tr>
<tr>
<td>13. Proposed HN: SHAPE</td>
<td></td>
</tr>
<tr>
<td>14. ACO Staffing Timelines Total weeks after ORRB: 8</td>
<td></td>
</tr>
<tr>
<td>Date released by ORRB: 23 DEC 08</td>
<td></td>
</tr>
<tr>
<td>Date released by CRCB: 15 JAN 09</td>
<td></td>
</tr>
<tr>
<td>Date received at SHAPE: 15 JAN 09</td>
<td></td>
</tr>
<tr>
<td>15. Planned Implementation Milestones (from HN): Forecast (and amended) Actual</td>
<td></td>
</tr>
</tbody>
</table>
a. TBCE Submitted to NOR:  

b. IC Authorisation:  

c. Contract Award:  

d. IOC  

e. FOC  

16. Key points for Discussion:  

17. Lines of Development Coordination:  

a. Training (ACT LO Team): Nil required  

b. Equipment:  
   (1) CIS (J6): Nil  
   (2) Non CIS (J4): One (1) portable Simultaneous Translation Equipment set is now required  

c. Personnel (J1): Nil required  

d. Infrastructure  
   (1) Real Estate and Civil Works (J4) Nil  
   (2) Electronic (J6): Nil  

e. Doctrine (ACT LO Team): Nil  

f. Organisation (J3):  
   d. g. Information and Interoperability (J3): Nil  

h. Logistics (J4): O&M costs are not expected to exceed 2000 EUR for re-charging, battery and spare part replacement  

i. Security (J2): For the translation/transmission of UNCLASSIFIED material  

18. Is the requirement included in (ISAF, KAF, or C4I) Development Plans (Reference):  
   This is a companion directive to the initiative detailed in FRAGO 376-2008 (Security at regular GMIC Press Conferences)  

19. Potential ACT Targeted Support (to include Mid to Long Term plans) (ACT LO Team):  

20. CMD Position: To endorse the requirement  

21. Recommendation:  

22. Options/Risks:  

Prepared by: LTC Wright, SHAPE PAO  

Reviewed by:  

Approved by: Col. Derek Crotts (USA A), Ch PAO  

23. CMRB Decision:
Annex 3-K Issue and Crisis Management

Working definition of a crisis: an event that creates or threatens to create harshly negative media coverage that could permanently damage the reputation or future viability of an organization.

Working definition of an issue: an external or internal factor – usually lasting over a mid- to long-range time frame – that could represent a serious obstacle to achieving an organisation’s objectives and cause damage to its reputation if not managed well.

1. Issue and crisis management as part of the PA planning process.

a. Issue and crisis management is a significant part of the PA planning process. Every issue or event, if not managed properly, could potentially escalate into a crisis. Issues and crisis management is a process of identifying a potential issue or crisis and co-ordinating an organisation’s response.

b. Issues and crises will always occur - the key to mitigating the negative impact is, first, to acknowledge and make efforts to solve the problem and second, to communicate the organisation’s actions effectively and in the most transparent way possible. Addressing the issue or problem is the commander’s responsibility with the PAO acting in a supporting role to communicate to the public. Without effective management of the central issue, PA cannot be effective and the organisation will eventually lose credibility.

c. When dealing with an issue, an organisation must proactively and as openly as possible keep the public informed of its actions in a timely and accurate manner. Poorly managed communications chip away at an organisation’s credibility, undermine public confidence and contribute to the emergence of crises. Properly managed crisis communications strategies entail co-ordinated responses emphasising identification and reporting actual or potential issues and problems, taking action to address and resolve issues quickly and effectively, and keeping audiences informed of what is being done to address the problem(s).

d. Specific issues should be monitored to assess the potential impact on the organisation; determine any changes in public opinion on major issues; and provide commanders with regular assessments of public opinion relating to such issues. Media analysis and opinion polls are examples of means to track issues. Because public opinion is an imprecise prediction of behaviour, issues-tracking must be a dynamic process carried out over time.

e. When faced with an issue or crisis, ensure that the requirement to inform the public is not delayed by the search for solutions. Instead, acknowledge the problem and inform the public immediately of the corrective actions being taken or being considered. Keep the public informed of
developments as they occur. A general rule of thumb: inform the media; tell them what you know; tell them what you don’t know; and tell the media when you think you will have more answers. In most cases, an organisation has less than an hour to respond to public and media queries before it loses credibility. A response stating, “We are aware of the issue/event/incident and we are looking into it. We will get back to you shortly” is better than saying nothing at all.

f. OPSEC must be assured at all times. When dealing with an issue or a crisis, PA activities must never undermine the safety of military personnel engaged in a military operation, or the success of a military operation or activity.

g. JFCs/CCs and deployed HQs should have an issues/crisis management team, of which the PAO is an integral part. The time to decide who needs to be part of this team is not in the middle of a crisis. Included in this Annex are a checklist for issues and crisis management and an example of a crisis management SOP.

2. Guidelines for Crisis Management. There are certain basic considerations common to all crises. The following guidelines form the basis for dealing with the aspects of crisis management:

a. **Be informed.** Keep an eye on the current issues in the media that could lead to your issues making the news and becoming a crisis. Try to identify potential issues before they begin to smoulder and ignite. Track the public environment.

b. **Do advance work.** Plan and anticipate what may go wrong. Pull together a crisis communications plan and crisis management team. Build relationships of trust with key stakeholders and the local community. This trust will pay dividends when a crisis emerges.

Some examples of potential events to anticipate include:

<table>
<thead>
<tr>
<th>Event</th>
<th>Event</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aircraft accident</td>
<td>Hostage situation</td>
<td>Senior leader KIA</td>
</tr>
<tr>
<td>Destructive fire at HQ</td>
<td>Investigations</td>
<td>Logistics attacks</td>
</tr>
<tr>
<td>Labour dispute</td>
<td>Mass casualties</td>
<td>Poisoning/food contamination</td>
</tr>
<tr>
<td>Environmental damage</td>
<td>Civilian Casualties (CIVCAS)</td>
<td>Service member misconduct</td>
</tr>
<tr>
<td>Natural disaster</td>
<td>Historical site damage</td>
<td>Political announcements</td>
</tr>
<tr>
<td>Cyber Attacks</td>
<td>Assassination</td>
<td></td>
</tr>
<tr>
<td>Personnel missing/ captured</td>
<td>Harmful High profile statements</td>
<td></td>
</tr>
<tr>
<td>Security leak</td>
<td>Loss of sensitive equipment</td>
<td></td>
</tr>
</tbody>
</table>

c. **Get the facts.** Determine the situation and then assess the PA implications. At this formative stage, make sure that the ACO PA TechNet
and appropriate command authorities know about the situation. Establish what information is approved for public release, and whether or not someone has prepared messages/talking points.

d. **Prepare messages/TPs** that you will want to use when you receive media queries. Engage with the responsible office. Draft news releases, Q&As, and media lines to use when the crisis occurs. Ask tough questions, and prepare appropriate answers.

e. **Know who has the lead.** It may not be you. It could be NATO HQ Public Diplomacy Division (PDD), national authorities, HN, ACO HQ at SHAPE, or the theatre command. Respect that lead and stay in your lane.

f. **Designate a spokesperson.** The spokesperson must be well informed and comfortable with the issue, since the credibility of the spokesperson is of paramount importance. The spokesperson should also be pre-selected and have received media and on-camera interview techniques training. You may also need a technical or SME if the issue is highly technical or complex. This person should also receive media and on-camera interview techniques training.

g. **Designate an ‘anticipator’.** The anticipator is a member of the crisis management team whose role is to assess how the crisis will evolve and provide advice and proposed solutions to manage that evolution with the aim of seizing the initiative. This person cannot be engaged in the minute-by-minute management of the crisis because the function requires that the individual has a ‘bird’s eye view’ of the process to better predict future direction.

h. **Maintain regular communications between PA and command staff.** Be “joined at the hip” with the Commander and his staff managing the issue. There is nothing worse in crisis situations than not knowing what is going on. Provide regular updates to the senior headquarters, and make sure they pass you regular instructions and situation reports. Keep the Commander and your people informed.

i. **Check standard operating procedures.** Although not all possible crisis situations may be covered, there is no point wasting time reinventing the wheel. For example, most military installations have standard operating procedures that govern actions that must be taken in the event of a fuel spill, for example.

j. **Get relevant, accurate information to the public as soon as possible.** Truthful, accurate and timely is the appropriate posture in times of crisis. It is better to tell bad news sooner rather than later. Once you have received clearance to make public statements, you should do so quickly and thoroughly. Update public information regularly as new material becomes available. The rule of thumb of truthful, accurate and timely information applies however accuracy should never be sacrificed for speed.
k. **Be accessible.** The media will be interested in the reactions and comments of military authorities, even if developments are slow. Remember that news updates, especially radio and television reports, must appear immediately to be newsworthy. For the media, it is far better to attribute a no-change report to a NATO spokesperson than to report no further word is available from the same sources. Accessibility also implies openness and progress, two important image builders during times of crisis.

l. **Be thorough.** Make every effort to pass the same information to all media agencies. During crisis situations, the media and the public often depend entirely on PAOs for information updates. If you do not pass new information to all agencies as events unfold, you can damage future relationships. Log all media queries. See Annexes 4-B and C for a template.

m. **Be considerate.** Take care not to violate privacy regulations. Respect the rules for releasing casualty information before the next of kin is notified.

n. **Be professional.** Crises bring out the best and the worst in individuals and organisations. Maintain a cool, balanced approach, and avoid being drawn into activities that are not directly related to managing public communications.

o. **Adhere to information/document management archival practices** in accordance with applicable NATO directives. Information management is critical when working in a stressful situation within a group dynamic.

p. **Be honest in preparing the post-crisis assessment.** An after-action report can be of tremendous value if prepared objectively, paying equal attention to successes and failures. You can only find future solutions by analysing past failures.

3. **Other Considerations for Crisis Management:**

a. **Appearance and tone do matter.** Choose words appropriate to the situation and be cognisant of underpinning context.

b. **Mind the emotions/intellect pendulum as a crisis unfolds.** There is a time for ‘cold, scientific facts’ and there are circumstances where facts will not be heard as emotions take control. Generally, issues can be discussed between groups of professionals. But in public hearings, or in demonstrations, facts often give way to emotions. If you can address a crisis early, as it begins to develop, you’ll have a greater opportunity to win with intellectual arguments – and a greater number of alternatives for action.

c. **Command the information.** Stay ahead of the story by maintaining follow-on press releases, statements, making responders or support network officials available for escorted media interviews.
d. Be perceived as having nothing to hide without speculating on causes or specifics that may be part of an administrative, criminal or safety investigation.

e. Stay tight organisationally, but stay loose tactically. Flexibility is essential and options should be continuously re-examined.

f. Constantly evaluate your messages and feedback. Watch the situation on an hourly or daily basis. Use clippings, surveys, personal and public meetings, or focus groups to gauge their information needs and perceptions.

g. Keep the communications lines open after the crisis. Maintain contact with your allies and other audiences. Good communications never really ends. Internally, review what the crisis has taught you about the effectiveness of your crisis communications plan. Externally, you may have to replenish your goodwill ‘bank account’. Opinion research can tell you how well you’ve weathered a crisis and point the way for your communications between the crises.

h. A tactic that has worked, particularly in Afghanistan CIVCAS allegations, is to deploy PA assets with a larger Crisis Action Team (CAT). This PA contingent of the CAT would deploy to the incident site to document evidence and mitigation efforts. The mission, resources and priority will dictate the size and composition of such a team. Irrespective of those factors, the team must be competent, prepared to deploy within the specified time and must be fully trained and knowledgeable as to the mission and requirements. Product return and release is critical to success.

i. Manage the expectations of the public. Some issues cannot be fixed in days, weeks or even months. Some are only resolvable through much higher levels of diplomacy, policy or funding. Understand, early on, that solutions could take time, money and effort.
4. **Checklist for Issues and Crisis Management.**

**Crisis Communications Checklist**

Managing crises is similar in procedure to managing issues. The only real difference is the speed at which events unfold and the degree to which the organisation becomes overwhelmed. When a crisis erupts, the following activities should take place immediately. In parentheses is the person in the organisation responsible for the action.

- **Find out what happened.** (Cmd. Group., Ops Team, issues management team).
- **Assemble the issues management team.** (Cmdr.).
- **Define the issue and the organisation’s position.** (Cmdr. or SME as appropriate).
- **Determine whether or not there are any legal implications.** (Legal Advisor).
- **Identify the SME.** (Cmdr.).
- **Identify the spokesperson(s); should be the SME.** (Cmdr. with PAO advice).
- **Continue to gather information.** (Issues management team).
- **Deploy assets as required and feasible.** Ensure assets are briefed on their requirements, are properly resources and have a clear understanding of their purpose. Planning for rapid product return and release is critical.
- **Log everything that happens.** (Issues management team member but PAOs should keep their own records as well).
- **Lateral coordination up the chain of command.** (Cmdr. or MA/EA as appropriate).
- **Lateral coordination along the PA TechNet.** (PAO).
- **Develop initial statement.** (PAO with SME and Legal Advisor [as required]).
- **Develop any other required PA products such as talking points, news release, backgrounder, etc.** (PAO with SME and Legal Advisor [as required]).
- **Alert website manager to post PA products as required.** (PAO).
- **Hold news conference if appropriate.** (PAO should confer with higher HQ PA).
- **Conduct regular briefings to the media.** (Spokesperson with PAO support).
- **Call in other resources if the existing team becomes overwhelmed or activate crisis PA plan.** (SME with PAO input).
- **Assign someone as the anticipator to forecast crisis evolution and begin preparations.** (Cmdr. or issues management team leader).
- **Monitor/Analyse media coverage and take corrective action as required.** (PAO).
- **Conduct comprehensive After Action Review – Implement lessons learned.** (All).
5. **Sample Headquarters Crisis Communications SOP.**

**SUBJECT: (Insert Unit) Crisis Communications SOP**

1. **Purpose.** To establish a Crisis Communications SOP for (Insert Unit) that provides an initial communication, IAW designated communication priorities, within one hour of plan implementation.

2. **Applicability.** Personnel performing or supporting crisis communications activities for the Public Affairs Office, (Insert Unit).

3. **Coordination and Responsibilities.**

   a. **PAO.** As the crisis communications manager, the PAO is responsible for formulating communications policy and objectives relating to the particular crisis; for providing expertise and assistance required to carry out command communications policy; for determining if it is necessary to formally notify the higher headquarters according to applicable NATO guidance and policy; for ensuring timely preparation, coordination, review and implementation of crises annexes; for marshalling crisis communication team/resources; does coordinating Legal Advisor as appropriate; for ensuring coordination and timely release and dissemination of crisis communications activities and products to the affected communities and media; and for coordinating crisis communication functions with senior staff at the scene of the incident, when and if required. Implements the crisis communication team alert roster. The PAO coordinates this plan for/with the commander.

   b. **Deputy PAO.** As deputy crisis communications manager assumes duties assigned by PAO; reviews crisis communication plan annexes; is part of the emergency Operations Centre, when implemented, to coordinate crisis communication functions.

   c. **PAO staff** perform duties as assigned by PAO or Deputy PAO; coordinates and prepares crisis communication plan annexes; plans and establishes NMOC, when and if implemented, to coordinate crisis communication functions; prepares crisis communication team alert roster with shift rotations to ensure site manning, as required.

   d. **Staff Legal Advisor.** Provides legal guidance and reviews statements prior to release.

4. **Procedures.**

   a. This crisis communications plan will be implemented upon notification by the commander or other authorised person that a crisis exists.

      (1) The commander is the designated Crisis Team Manager (CTM) for crises occurring within the facility.

      (2) Exceptions: the commander may designate another Senior Officer or Commandant of a subordinate unit as CTM for a localized
crisis pertaining solely to breaches of order, discipline or regulation by their assigned personnel (staff, faculty or student body).

b. The POC list at (Annex ...) contains names and phone numbers of:

(1) Commander and senior staff (J-staff, special staff, directors, tenant unit commanders and commandants);

(2) Local and regional broadcast and print media, wire services news desks; stance on military should be included.

(3) Mayors and public safety officials of adjacent communities;

(4) Senior headquarters’ and senior HQ PAOs will be maintained as an appendix to this plan. The roster will be reviewed and updated semi-annually.

c. Refer to the appropriate annex for crisis-specific guidance. Crisis communications management fact/information sheets designed to provide guidance for each type of situation identified as a smouldering crisis are at annexes plan. (Note – Each potential crisis situation should be identified and addressed in separate annexes or ‘playbooks’).

d. Only the commander, PAO or PAO’s designee(s) may authorise release of information.

e. Members of the Crisis Communications Team will log their activities to facilitate after action review for evaluation of crisis communications procedures.

5. Files. (UNCLASS) Electronic files will be used for coordination. Paper files will be maintained in the current files area of the PAO.

6. References.

(Note: Attach as applicable)
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#### Top 3 Issues/Concerns (Media Topics, Manning, Resources, etc.)

#### Chief PAO's Assessment and Recommendations

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Annex 3-M       Public Affairs Outputs

The following products, while not an exhaustive list, are some of the more common releasable PA products:

- Audio messages / Streaming audio.
- Briefing packages / presentations.
- B-roll packages.
- Electronic newsletters – either intra- or inter-net.
- Fact sheets.
- Imagery, still and/or video.
- Internet site (public website).
- Direct mail.
- Display/notice boards/screens (for important messages and updates for staff).
- DVD video products.
- Email or all users messages.
- Exhibitions and displays.
- Hometowners (photo and story of soldiers sent to their hometown newspapers).
- Leaflets / brochures / tri-folds / pamphlets.
- Letters to newspaper editors.
- Media advisories.
- Media clippings.
- MRLs also known as TPs or LTTc.
- Media engagements.
  - Background discussions.
  - Media roundtables.
  - News conferences.
  - Q&As session.
- News releases.
- Pocket cards (Internal communications - command information).
- Podcasts (also known as on-demand streaming video).
- Press kits.
- Publications, either internal or external.
- Town hall meetings (for staff or with the local community).
- Visual e-mail (video).
Chapter 4

Media Relations/Operations (PA Core Function)

“There is only one thing in the world worse than being talked about, and that is not being talked about.”

– Oscar Wilde

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4.1. Introduction.

a. Media Relations is the doctrinally acceptable term set forth in MC 0457/2 and AD 095-001 to describe the activities designed to provide information through traditional mass communication means to NATO audiences. This Handbook acknowledges this terminology but also recognises that mere connections or associations and separate and isolated activities will no longer suffice at the tactical, operational, and strategic levels. It acknowledges an extremely complex environment at each of those levels that requires an increased level of coordination across the communication landscape. Therefore, this handbook more appropriately refers to the function as media operations to reflect the current realities at those levels. Both terms are used interchangeably and are equally acceptable.

b. Commanders and staffs, with the assistance of PAOs, should be prepared to engage the media, respond to media inquiries, issue statements, conduct briefings and interviews, arrange for access to permanent and operational units and distribute information including imagery, etc., all as a means to gain and maintain public support, be accountable and develop relations with the purveyors and the consumers of news.

c. The media, in its traditional (print, radio, television) and social (bloggers, citizen journalists, etc.) forms, is a conduit for NATO to tell and show, in words and images, the NATO story to local, national, and international audiences. Relationships with the media must therefore be forged and strengthened on a proactive and continual basis, particularly before crises emerge. Building and maintaining such relationships provide the media with opportunities to constantly learn and receive updates about our NATO organisations and to better understand how we operate in order to provide appropriate context when reporting.

d. Since the commander is likely to be seen as the most credible spokesperson for his/her mission or headquarters, he/she will often speak publicly, and should therefore seek and receive the advice and support of his CPAO, specifically in preparation for media interviews or public engagements. However, any uniformed member of NATO regardless of rank or position, who responds to media or speaks publicly about an issue, will be perceived as "a NATO military spokesperson," regardless of whether that is technically the case or not. All PA practitioners, particularly those working in media relations, should be empowered to interact with the media to deliver the agreed and appropriate Alliance messages and support communications objectives. Media interactions must be transparent and "off-the-record" interactions should be the exception, not the norm. The ACO PA position is that should be leveraged and empowered to engage the media in an official capacity, "on-the-record" and fully attributed, provided those personnel are trained, knowledgeable and acting within their lanes and responsibilities.
4.2. Guidelines to PAO - Working with Media. The following are guidelines ACO PAOs will follow when dealing with the media:

- Develop a relationship with local reporters and maintain regular contact. Once a firm relationship is established, journalists will continue to contact that PAO.

- Establish a specific system of contact with journalists (email, fax, mobile, social media platforms /Facebook, Twitter/, Skype, etc.). Maintain a master media contact list and update it regularly.

- Know and understand your local media. Understand the requirements, capabilities, limitations, deadlines, political affiliation, biases, and other motivations of the local media representatives. This understanding will better prepare your staff to meet their needs and will assist with projecting your message to them.

- Always return media calls or emails as soon as possible. Even if the answer is “I don’t know”, a speedy reply and an honest answer will assist in building relations and credibility.

- Be courteous and fair in dealing with various media agencies.

- Help news media representatives obtain the releasable information they need. Do not be obstructive. Bad news does not get better over time.

- Be accurate. Check and confirm all factual information. Even if you are not quoted extensively, from a credibility perspective your knowledge and attitude may have a considerable impact on the journalist as far as the slant and tone of the report are concerned.

- Do not compromise accuracy for timeliness. Release what information you can verify as accurate before the reporter’s deadline with a promise to provide additional information as it becomes available.

- Always use accurate security classifications. If an item of information is classified, by all means say so but do not pretend it is classified simply to avoid answering sensitive questions.

- Have reasonable expectations. Competition for space and broadcast time is fierce and editors and news directors will decide which items to use.

- Never make “off-the-record” comments. All comments you make can be used and attributed to you.

- NATO does support the principle of freedom of the media and does not support censorship. It is not appropriate for a PAO to pressure a journalist to use or not use an item of information for publication or broadcast.

4.3. Requests for Information. Often, journalists will contact the Public Affairs Office with particular requests for information. The following are recommended consideration points for addressing these requests:

- Return media calls or emails as soon as possible.

- Develop a system to record and log all media contacts (suggested templates are provided at Annexes 4-B and 4-C) in order to:
- Establish the exact nature of the enquiry (information to be used in TV/Radio broadcast, live or recorded, for print, etc.).
- Determine specific questions and the reporter’s deadline.
- Determine the reporter’s level of knowledge of the subject matter. Do not assume a reporter is either well-informed or ill-informed. You may need to provide additional information.
- Ascertain what specific areas are intended to be covered.

- Determine who will need to provide the information (SME) and pass the request to that SME to compile response.
- Collect, review and edit responses provided by SMEs. Be sure to get appropriate clearances before releasing information to the media.
- Get approval from chain of command (CPAO, COS, DCOM, COM, ACO headquarters, NATO PDD) and/or Legal Advisor and/or Political Advisor as appropriate.
- Provide information to the reporter. Additionally, include copies of relevant material such as fact sheets, news releases and backgrounders as appropriate.
- Arrange for collecting copy of news article or broadcast.
- Analyse and evaluate final product: Was information reported accurately? Were the command’s master messages incorporated into the story? Was the article positive toward NATO, your command, the operation?
- Immediately correct any substantial factual errors, either during interviews or after publication. Errors left uncorrected stand as fact.
- Provide feedback to leadership and chain of command.

4.4. Requests for Interviews. Consider the following recommendations when receiving requests for interviews:

- Timely responses aid in fostering the PAO/media relationship.
- Establish the exact nature of the enquiry (a template of Interview Planning Guide is provided as Annex 4-N) by collecting the following information:
  - Will the information be used in TV/radio broadcast, live or recorded, for print, etc.?
  - Determine specific questions or subject areas to be covered during the interview.
  - Determine the reporter’s level of knowledge of the subject matter.
  - When does the reporter want to conduct the interview?
  - Who does the reporter want to interview? Assess if that is the best person to be interviewed based on the subject areas to be covered. Determine appropriate interviewee and concurrence from chain of
command. (CPAO, J-Head, Chief of Staff, Deputy Commander or Commander).

- Confirm availability of interviewee and interpreter if required.
- Confirm details of interview with the journalist (date, time, place).
- Prepare the interviewee (a template of SME Interview Preparation Worksheet is included as Annex 4-O):
  - Coordinate with the relevant SME to provide briefing material and/or talking points.
  - Conduct practice interview session, if time allows. Include time to practice communicating through an interpreter.
- Coordinate interview (access for reporter, PAO escort, location free of background noise).
- Record interview for official record-keeping purposes.
- Arrange for collecting copies of news article or broadcast.
- Analyse and evaluate final product: was information reported accurately? Were command’s master messages incorporated into the story? Was the article positive toward NATO, your command, the operation?
- Immediately correct any substantial factual errors, either during interviews or after publication. Errors left uncorrected stand as fact.
- Provide feedback to leadership and chain of command.

4.5. **Releasable Products.** The following are suggestions for releasable products. This list is by no means exhaustive.

a. **News Releases.** A well-written news release is a traditional and necessary ingredient of most, if not all PA plans. The news release serves not only as a source of information, but also provides notice to editors and news directors of policy developments, operations, events, and activities they may wish to cover in greater depth using their own resources. For this reason, news releases must also be sent to radio and television stations, and posted on the organisation’s Intranet and the Internet sites. It is standard practise to send out the same news release to all media agencies that you deal with at the same time. A checklist and example for writing news releases can be found as Annexes 4-J and 4-K.

All news releases must be approved by the appropriate level authority and comply with NATO Visual Identification Standards. Potentially contentious or significant releases should always be coordinated with higher headquarters before release. Significant news releases or major announcements should never come as a surprise to the chain of command or to higher headquarters.

Moreover, the contents of a news release should be communicated by the chain of command (not necessarily the PAO) to the internal military/civilian
audience before the media receives it - particularly if it is sensitive, controversial, negative or tragic information.

The news release is just a product, and only one way of trying to achieve a specific communications objective or effect. Bear in mind, however, that not all activities warrant the issuing of a news release. In essence, a news release must be “newsworthy” to be relevant.

b. Media Advisories. Media advisories serve to alert media to upcoming events they are invited /encouraged to attend or products which have been made available to the public, by means other than news releases. Examples include advising of upcoming media briefings, news conferences, or postings of documents or images on social media sites. An example of the recommended format can be found at Annex 4-L.

c. Declassified Documents. As required and when necessary, documents may, at the discretion of the commander and with the appropriate staff coordination, be declassified or redacted in order to be released to the public. Release of these products will not be a unilateral decision of the PAO. They will require proper staff and Command Group consultation and will require notification to the higher headquarters PA channels.

d. Facts Sheets. Prepared fact sheets with basic information about your command, activities, operation, exercises, etc. are always very useful background material for media. The PAO should maintain and update these products as required. Quite often pre-approved fact sheets serve as factual background information useful when answering to media queries.

e. Social Media Postings. Media, third-party advocates and citizens around the world use and monitor social media sites of all varieties. PAOs should strive to engage with their audiences through social media platforms. Guidance for ACO social media usage in PA is governed by AD 95-3.

4.6. News Conferences.

a. News conferences are generally a good way to reach a large number of media with the same message at the same time. They follow a set procedure and can be excellent communication tools as long as they are well organised, taking the needs of the media into account. There is always an opening statement by a figure of authority or spokesperson then a Q&As session with media for a pre-determined time period.

b. News conferences should always be moderated by a PAO. The moderator is the event manager who sets the ground rules and time limits, introduces news conference spokespersons/participants, manages the Q&As session after the initial statement, and wraps up the event. The moderator also takes notes during the event in case follow-up action is required.
c. At the conclusion of the news conference, a transcript of the event, audio file or summary of topics (with specific relevant quotes) should be made available to further highlight the event. Once this product is available, consider informing the media on your Website or social media platform.

d. A news conference aide memoire, news conference procedure, room layout and sample moderator’s opening remarks are at Annex 4-I.

4.7. **Background Interviews.** Background interviews, also called ‘backgrounders’, are a good way to maintain contact and develop your relationships with local media. Backgrounders are typically information that is provided to a reporter that can be used without specific attribution. A background interview can be used to inform or educate a reporter about your organisation, operation or specific topic or issue. It can also be used to provide context and depth to complicated issues. Note that there is also a PA product called a ‘backgrounder’ (fact sheet) so use the term ‘background interview’ to ensure clarity. Background interviews and briefs are not ‘off the record’.

4.8. **OPSEC.** The need for OPSEC, versus the media demands for access to information, is a historic challenge that military commanders must always compose with. Commanders must keep in mind that certain legal obligations and the principles of democracy dictate that their forces must maintain the support and confidence of their populations. This necessitates an open and honest flow of information. Access to this information may sometimes conflict with the need for security in military operations. When this is the case, it is acceptable to tell a journalist that certain information cannot be released for that reason. PAOs should consult with other staff agencies for advice when deciding release criteria for information. The challenge is to balance the needs of the public and media for information with the operational security requirements of a military operation.

4.9. **Media Embargoes.**

a. ‘Embargoed’ Information. At times it may be necessary to ‘embargo’ information given to the media. An embargo is an agreement with one or more media representatives not to publish defined information before a specific date and time (expressed in GMT). The importance of a media embargo cannot be overstated because of the impact on operations and on soldiers’ lives. It should be used sparingly, in cases where it is important that information is released but is protected in terms of time sensitivity or OPSEC. Embargo time should be kept to the absolute minimum necessary for OPSEC.

b. Violation of a Media Embargo. Should a journalist violate the rules of an established embargo, the rules violation will be immediately reported back to the Theatre CPAO and the media representative’s parent organisation or bureau chief. Appropriate punitive actions should be considered to include withdrawal of NATO support to the journalist or agency. The CPAO within the command will decide the course of action to be taken in such circumstances, upon consulting with the Command Group.
and higher headquarters.

4.10. **Media Registration.**

a. All media requesting support or access to units to cover NATO operations must be registered. This includes traditional media working for established news agencies, freelance journalist, and the various military media representatives who are not supporting units on the battlefield.

b. Registration versus Accreditation.

(1) Accreditation is the verification and validation that a person represents or is affiliated with a legitimate news organisation. This means that accrediting national or international organisations will physically verify the affiliation of an applicant with a specific news organisation. It can also refer to the accreditation card or other document issued to the media representative. MC 0457/2 establishes for NATO that accreditation of journalists or other media representatives is a national responsibility. NATO PDD is responsible for verifying journalists accredited to NATO HQ.

(2) Registration, however, is the process confirming the credentials of a journalist or other media representative, who may be required to fill out a registration form (name, agency, phone numbers, etc., see example in Annex 4-U) and provide proof of identity and affiliation with a news organisation (NATO may issue a photo-registration card\(^{21}\) to manage access to NATO Media Operations/Information Centres (NMOCs/NMICs), facilities, properties and people. It is merely an accounting tool, which provides PAOs the ability to know what media are represented in the theatre, where they are located, and their movement around the theatre. This information is helpful in planning and conducting media logistical support and transportation, and in preparing subordinate commands for media encounters. It is also helpful to commanders who might want to provide newsworthy events to the media. Registration also identifies which news media have asked for military assistance and access, and have formally agreed to the command's media ground rules.

c. The command should develop a registration policy and procedures for allowing media access to facilities, conducting interviews or covering planned events, exercises or operations. Appropriate measures should be taken to streamline theatre and national requirements in a single policy to avoid confusion.

d. The following are the general principles applicable to the

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\(^{21}\) This card does not guarantee access and does not serve as a substitute for official identification documents, such as passports or national identification cards. Media representatives must also meet other requirements imposed by host nations, such as visas.
management of a media registration programme:

- The PAO will be responsible for the screening of journalists, the collection of biographical/agency information and for providing accreditation cards or badges to the news media representatives. Journalists’ information will be updated periodically.
- The PAO will frequently consult and co-ordinate with the access-control authority to ensure the PAO staff is informed of current policies and procedures for allowing access to non-NATO personnel.
- The PAO will act as the advocate for media in all planning and policy development with respects to force protection and base security measures.
- Media will provide accurate personal and biographical information, news bureau and employment information, medical information, current passport information and subscribe to other mandated measures (i.e. photographic and other relevant database, etc.).
- Media representatives will be required to provide valid media credentials in order to access NATO military compounds.
- Journalists who refuse to agree to the applicable military “ground rules” and who are not registered will receive only the support and information assistance as provided to the general public.
- Journalists should be informed that registration and acceptance of media ground rules will entitle them to better access to units and SMEs, and possibly the provision of military ground and air transportation when required and when available.

e. The registration process is usually conducted in five basic steps:

- Verify the identity of the news media representative (including checking for valid passport/visa, professional media organisation membership card, media ID card, other military media credentials, etc.).
- Have media representatives sign an agreement stating that they will abide by the established media “ground rules” for the operation. If required, revoke credentials for those who violate the ground rules (enforcement of this requirement is essential).
- Have news media representatives agree to and sign a liability waiver that frees the military of responsibility if the media representative is killed or injured as a result of covering the operation (an example of a waiver of liability is at Annex 4-R).
- Give news media representatives proof of registration (memorandum, press card, press badge or other identification).
4.11. **Media Escorts.** Commands are required to address media escort requirements and, as with the accreditation policy, streamlining of national policies should be attempted. The following are the ACO PA expectations for media escort duties.

a. Media must be accredited prior to access to NATO operations.

b. Media should be escorted at all times.

c. Preferably, media escorts should be trained PAO staff members. However, history shows that there are not enough PAO personnel to accommodate the high number of media which cover NATO operations, particularly at the tactical level. In this case, designated personnel, trained and empowered to fulfil the duties can be authorized by the local command to perform the tasks of media escort.

d. **Duties of Escort:**
   
   - Brief media on expectations, re-iterate and enforce the media “ground rules”.
   - Facilitate media access through security and within military facilities.
   - Ensure compliance with timelines and military procedures.
   - Put military terms and concepts into context.
   - Explain and enforce OPSEC.
   - Assist media with filing products through military or other communication systems as required.
   - Conduct an after action review and assessments at completion of the escort.

4.12. **Media Training.** Commanders, designated spokespersons or SMEs commonly called upon to make media statements or be interviewed should undergo formal media training. Chapter 7 of this handbook covers the various aspects of PA training.

4.13. **Working with Interpreters.** In the NATO environment, it is often necessary to work with interpreters. It is important to work with accredited and trusted interpreters when conducting interviews. Interpreters are often local civilian hires and can be a good source of cultural information. A comprehensive list of planning factors for working with interpreters is included as Enclosure I at the back of the handbook.
Annex 4-A  Establishing a NATO Media Operations Centre and a NATO Media Information Centre

1. NATO Media Operations Centre (NMOC).

   a. NMOCs fulfil the requirement for a focal point for the news media during military operations. The NMOC is an element of a PA office or section established within a NATO body, mission or operation, to deal with day-to-day management of media operations, specifically in response to crisis management. In essence, it is a command post for media support efforts. It serves as both the primary information source and as a logistical support and coordination base for news organisations covering the operation.

   NMOCs are organised when large numbers of news media representatives are anticipated to cover military activities and may be formed for all types of operations or for any stage of an operation.

   NMOCs are subordinate to the command's PAO and should support and be accountable to the senior commander of the operation on a 24-hour basis. They provide the commander a professional, immediately available, fully trained service designed to respond to HN, regional and international civilian media interest in NATO military operations.

   In addition, the NMOC provides the following functions:

   - Provides a single point of contact and information for media within the theatre.
   - Plan and integrates PA, media engagement and messaging into NATO operations.
   - Provides oversight and enforcement of media guidelines and “ground rules”.
   - Act as the primary information release authority for the command.
   - Provide coordination of news media coverage, media visits, and embedding program participants.
   - Provide guidance and coordination through participating Alliance national PA entities.
   - Prepare and conduct media briefings and news conferences.
   - Manage registration and accreditation of news media representatives.
   - Facilitate the declassification and release of operational imagery and weapons system video.
   - Collects, archives and disseminates imagery.
• Manage the mission’s or operation’s Website and social media presence.
• Conduct media monitoring and analysis.

b. Organisation and personnel staffing of media operations centres are determined by the responsible command in coordination with the PAO and his staff. The NMOC staff should be a proportionate representation of the forces, with representation from all nations involved in the operation. Regardless of the echelon establishing a media operations centre, the organizational model is functionally designed and remains relatively the same.

ACO recommends that NMOCs be organised so that they provide the following capabilities:

• Command and Administration.
• Planning and Analysis.
• Media Operations.
• Social Media – Imagery and Internet.
• Production and Internal Information.

A recommended CE structure for a NMOC is included at the end of this Annex.

NMOC section’s responsibilities are as follows:

(1) The Command and Administration Section is responsible for the overall command and control of all NMOC functions and the operation of the NMOC. It should be staffed and equipped to carry out the following tasks:

• Assume supervisory responsibility for all NMOC actions.
• Coordinate and liaise with the mission Command Group, keeping the Command Group apprised of all NMOC activities.
• Provide administrative support to NMOC personnel.
• Ensure that PA guidance from higher headquarters is understood and applied by NMOC personnel.
• Establish internal procedures for staffing, assignment of duties, and prioritisation of tasks.
• Obtain and maintain NMOC supplies and equipment.
• Obtain and maintain imagery transmission capability and Internet connectivity, so that time sensitive imagery can be disseminated quickly.
• Provide clerical support.

• Register news media representatives, and assist them with necessary administrative arrangements.
• Co-ordinate transportation, logistics and local contracting support.
• Co-ordinate linguistic services, as required.
• Manage facilities e.g. conference room bookings.

(2) The Planning and Analysis Section is responsible for forecasting, planning and coordinating PA requirements and operations with the remainder of the mission Command Group and the PA staffs of higher, lower and adjacent headquarters. It is also responsible for conducting media monitoring and analysis. The section should be staffed and equipped to carry out the following tasks:

• Co-ordinate with internal, higher, lower and adjacent HQs and MOCs.
• Prepare and co-ordinate PA annexes, plans, and issue guidance as required.
• Remain abreast of current and future operations/events of the mission.
• Monitor media coverage (print, TV, radio, web) and flag any issues requiring clarification/correction.
• Provide media monitoring reports to Command and Admin Section for dissemination to the Command Group and PA TechNet as appropriate.
• Identify media coverage trends (over days, weeks and months) and by intimate knowledge of the relevant information environment seek to explain them, as well as identify relevant counter information measures.

(3) The Media Operations Section (Media Ops) is responsible for maintaining direct contact with the news media, operating a media desk, responding to queries and conducting media escort duties. Media Ops staff should work closely with personnel in Plans and Social Media engagement. The section should be staffed and equipped to carry out the following tasks:

• Anticipate, identify and exploit all media opportunities.
• Respond to, and maintain a log of media queries.
• Arrange and co-ordinate media interviews, tours and visits.
• Provide, or arrange for, media escorts.
• Draft news releases and MRLs/LTT/TPs/Q&As.
• Maintain up-to-date information on the operation.
• Facilitate the declassification and release of operational imagery and WSV with other HQ staff elements.
• Brief media representatives on the mission/operation, supplemented by SMEs as appropriate.
• Provide oversight and monitoring of status of embeds.
• Identify and bring to the attention of the CPAO any issues dealing with the application of media “ground rules”.

(4) The Social Media Engagement Section is responsible for gathering, cataloguing and disseminating imagery about the operation and establishing and maintaining the operation/mission website. The section should be staffed and equipped to carry out the following tasks:

• Make imagery available to the news media via approved ACO Imagery sites.
• Develop and maintain the operation website or, where the website is maintained at higher headquarters, provide updated content on a regular basis, but not less than weekly.

(5) The Production/Internal Information Section is responsible for producing or assisting with the production of all PA products required by the NMOC. This section must work closely with all of the NMOC sections for imagery content and production. The section should be staffed and equipped to carry out the following tasks:

• Assist Media Operations and Social Media with the production and development of imagery releases, video releases, fact sheets, backgrounders, or other releasable products.
• Produce an internal information vehicle for the operations such as newspapers, newsletters, video / blog updates and Intranet products.

c. The physical facilities of the NMOC should be adequate to accomplish the mission and project a professional image to internal and external visitors. Daily operations necessitate that the NMOC staff working space, including equipment areas, meeting rooms and security control points, are separate from any media work space that may be made
available to media in the NMOC. Security conditions for a particular operation may preclude media presence inside the PAO workspace, and media may have their own working arrangements, including being accommodated by national contingents, thereby reducing the demand for work space in the NMOC.

A separate location outside the sensitive areas needs to be available for news conferences and media briefings. Included in this requirement is the need of adequate lighting, reduced noise levels, a sound system, simultaneous translation equipment (if possible), access to electrical power, a splitter box, a stage or raised platform for both the participants and for television/still photographers, seating arrangements which can accommodate the anticipated number of media representatives, and support requirements for interpreters.

d. During the first 24 hours after arrival in a new theatre of operations, a Media Centre can provide limited media support services. But within this first operational day, the NMOC must:

- Establish a ‘hasty media centre’ as the initial focal point for the news media until additional media support forces arrive.
- Establish communication with higher and subordinate HQ, SHAPE and NATO HQ and with units operating within the theatre.
- Gain a situational awareness of the media in theatre under Alliance national invitations.
- Establish command structure, lines of authority and release authority within the theatre.
- Coordinate with appropriate authority for leasing and purchasing contracts.
- Begin to register news media personnel in the area.
- Provide basic media support (coordination of media access to subordinate units and media escort as resources permit).
- Assist or conduct command news briefings and conferences.
- Coordinate SME interviews.
- Be capable of assisting in the transmission of media products.
2. **Example of PA lines of authority of a DJFC\(^{22}\) NMOC:**

![Diagram showing PA lines of authority for a DJFC NMOC]

---

\(^{22}\) Deployable Joint Force Command
3. **Example of organisation of a DJFC NMOC.**

Part of the Initial Entry Force (IEF) will be the PA team of DJFC HQ. The NMOC will start to deploy with and co-locate with the initial CE and will be the main POC for all media in theatre. The head of NMOC is the DJFC HQ PA advisor (DJFC CPAO) and the NMOC/PAO organisation is as follows:

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4. **Recommended CE for Crisis Response Operations NMOC.**

### Command and Administration

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### Planning and Analysis

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5. **NATO Media Information Centre (NMIC).**

Media have a right to be in theatre and to cover NATO activities. The MC 0457/2 states that all NATO-led military operations or other activities involving a major deployment of forces will establish a facility in theatre to host and inform journalists and other media representatives, which will normally take the form of an NMIC, in a location and facility as accessible to the news media as security conditions allow. An NMIC will normally contain a briefing area, offices for PA staff and should offer telephone, Internet and other services to media representatives. NMICs can also be established in the exercise areas for major training events. If required, Media Information Centres (MICs) subordinated to the NMIC may be established in forward locations.

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23 The demand for news about a particular NATO activity is not necessarily directly related to the size of the deployed force. A small deployment can generate sustained international attention, whereas a large force that has been operating without incident may attract very little interest. The PA organisation should be sized for the task and manning reassessed during regular Peacetime Establishment (PE) and Crisis Establishment (CE) reviews (see Enclosure E on manpower).
### Response to Query Form

**Response to Query Record Form**

SUPREME HEADQUARTERS ALLIED POWERS EUROPE  
PUBLIC AFFAIRS OFFICE  
B-7010 SHAPE, Belgium

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**Specific Questions:**

**Actions Taken:**  
(Include coordination / information sources)

**Follow-up Actions:**

**Reviewed and Closed out by:**  
Close out Date:

**Naming Convention**  
Control #: YYYYMMDD-(Sequence #)  
Save as (File Name) on DHS: (Control Number), Issue, Agency, Reporter
# RTQ TRACKER

**Supreme Headquarters Allied Powers Europe**  
PUBLIC AFFAIRS OFFICE  
B-7010 SHAPE, Belgium

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**Note:** The table is intentionally left blank to demonstrate the structure and content expected in a RTQ Tracker. Each column represents a specific aspect of the tracking process, including the date and time of receipt and response, the reporter’s name and agency/bureau details, the issue at hand, and the action officer and their actions. The table is used to systematically track and manage queries and their responses within the organization.
<table>
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ACO recommends the following matrix as an example to track media embeds. Such a product allows the Media Operations Section to maintain situational awareness of embeds, current status of embed requests, and provides a convenient briefing reference to inform the command and higher HQ Public Affairs.

This example is created in Word for inclusion in the Handbook, but obviously an Excel spreadsheet would be of more utility to the user.

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Story ran in WN on 3 Dec 09
Story ran in CT 3 Oct
Carried throughout wire service
Annex 4-F  Media Kit Guidelines

1. Media Kits are an effective tool to properly inform media representatives about the command, operation, or standard issues prior to the event. They help to ensure that known or factual information is accurate from the command’s perspective.

2. Consider inclusion of the following information when developing a media kit:
   a. Schedule of events – do not forget contingency arrangements
   b. Strip maps, key routes, sites.
   c. Fact sheets – equipment, organisations.
   d. Biographies – key personalities or keynote speakers.
   e. Advance copies of key-note speeches.
   f. News releases, media advisories, special events calendar.
   g. Photos and cutlines.
   h. Video releases, including “B rolls”.
   i. Related news articles.
   j. Frequently Asked Questions (FAQs).
   k. General or baseline information (i.e. command and organisational structure, rank structure, etc.).
   l. Explanation of Acronyms.
   m. Local lodging and restaurants, as required.
   n. Documentation referenced by SMEs or spokespersons.
   o. NATO or NAC directives, mandates, charters.
   p. Other information directed by the command.

3. Consider the following when preparing media kits:
   a. Provide a POC (coordinate through Media Operations) and phone number on each item in the media kit.
   b. Make it professional and attractive. A simple folder with inside pockets is sufficient.
   c. Get approval. Submit kit ideas to the PAO and appropriate approval authority for review and approval.
   d. Maintain OPSEC. Use open source information when possible.
   e. Review media kits frequently to ensure the information is current and relevant to the specific event.
   f. Provide e-mail addresses and links to social media sites. Invite the media to join those sites.
## Annex 4-G  Recommended for Media Packing List

### FINANCIAL

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<th>QTY</th>
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### CLOTHING & EQUIPMENT

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### HYGIENE ITEMS

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Journalists may bring sufficient equipment to cover operations. However, it is the journalist’s responsibility to carry his own gear.

Transmitters are authorized but blackouts may be imposed as per tactical and OPSEC requirements.

All equipment and clothing should be neutral, subdued colours for tactical considerations. Avoid easily flammable synthetic fabrics.

Please refer questions to Public Affairs – Media Operations (insert contact information).
Annex 4-H Media at Entry Control Points

The following is Media Guidance recommended for Entry Control Point (ECP) personnel.

1. Units will ensure that base/unit security elements are provided current approved media rosters.

2. ECP elements will be directed and rehearsed on the following tasks when approached by media demanding access to the base/unit or attempting to document base/unit entry points:

   a. Check media representative credentials. Only media representatives listed on the current media rosters will be allowed access to the base/unit unless accompanied by PA personnel. Media representatives not listed on the approved media roster will be professionally informed that they must contact the PAO for proper credentialing and will be denied access to the base/unit. Base/unit security personnel will attempt to gain the names of the media representatives and forward them to the PAO for tracking.

   b. If a credentialed media representative is unaccompanied by PAO personnel, the security detachment will hold the media representative at the gate/gangway and notify PAO office.

   c. Media representatives attempting to take photographs of ECPs physical disposition, procedures or force protection measures will be required to delete the photographs, as this constitutes sensitive information which, if released, can endanger the lives of personnel or compromise the success of the mission. Observe and verify that the media has deleted or erased the images. Report the situation to the PAO immediately. Forward the reporter's name, agency and credential numbers (as appropriate) to the PAO.

   d. Individuals documenting ECP procedures who do not possess any form of credentials may be detained in accordance with international law pending determination of their status and/or intentions.

   e. At no time will media representatives be allowed into an operations centre/room or sensitive area without first making positive hand-off to a PAO representative.
Annex 4-I  Preparing for a News Conference

1. **Preparation.** Use the following points as an aide memoire for organising and conducting at news conference:

- **Obtain appropriate approvals.** Your news conference should not come as a surprise to the chain of command.

- **Consider national and international linkages and issues.** Local issues may have something in common with regional, national, and international issues.

- **Is a news conference the most appropriate and effective way to deliver the message?** Is this announcement or occurrence of important news value?

- **Select the proper spokesperson(s).** The principal spokesperson should be the most qualified and knowledgeable person available. You should thoroughly brief this spokesperson using background material and relevant Q&As and then conduct a rehearsal. Likewise prepare appropriate SMEs.

- **Select the proper venue.** Choose a location large enough to accommodate the numbers of journalists that are expected. Confirm adequate electrical power is available to accommodate television lights and that an Internet connection, VTC and/or satellite connection are available as required. Make sure the location is easily accessible, and that media representatives do not have to carry heavy equipment long distances. Be sure the room is well-ventilated in summer, and well-heated in winter.

- **Send out invitations.** Send out a media advisory usually about four or five days before the news conference, unless a news conference is called at short notice following an incident or as a result of breaking news. Follow up the day before with a telephone call to media, editors, or news directors. The day of the news conference, set up a registration desk to record which. If time permits after the event, check back with those who did not show up to offer them a copy of the media package you prepared for the event. This demonstrates interest on your part, and it may help you get a better turnout at future news conferences.

- **Prepare information kits and hand-outs carefully.** Information kits are valuable aids because they allow the officer in conducting the news conference to refer to the kit for technical questions or statistical details. The person giving the news conference must be completely familiar with the contents of the kit, since credibility can suffer if that person mistakenly refers to information not included in the kits. Distribute the information kits and copies of prepared remarks before the news conference starts.

- **Have a moderator.** As the PAO on site, you will often serve as moderator. The moderator introduces the spokesperson of figure of authority involved in speaking to the media at the news conference, establishes and manages the “ground rules”, summarises the contents of the information kit, and indicates who is next in line to ask questions. Basically, the moderator is a low-key master of ceremonies. As the moderator, it is crucial for you to clearly state the “ground rules” for the news conference and indicate the scope of material to be covered. Always let the media
representatives know from the beginning how much time the news conference will last and the number of questions that will be taken after the initial statement. The moderator also has the important responsibility of bringing the news conference to a smooth conclusion, using statements such as "I see we’re nearly out of time. We will take one last question, please."

- **Select visual aids and products carefully.** Make sure the media representatives know from the outset which visual products will be available. For example, television reporters will expect copies of video recordings, and print journalists will want photographs, copies of charts, statistics and overheads. If copies are not immediately available, you should say so, but be prepared to provide them later on.

- **Accommodate all media.** Television reporters are the most challenging to accommodate, although photographers pose special challenges as well. From a visual perspective, the table or lectern for the spokesperson participating in the news conference should be the focus of the event, at the front of the room, ideally on a slightly raised platform. You should prepare a large central aisle to permit camera operators to shoot straight on. If you provide a centre aisle, make sure there are also wide side aisles to give camera operators the freedom to move during the news conference and to allow for unobtrusive access for late arrivals. Alternatively, you should provide camera risers at the back of the room to permit filming over the heads of other participants and media representatives. In an outdoor setting, you can mark off a semicircle facing the spokesperson, to allow the news conference participants and the media representatives to arrange themselves according to their requirements. Television reporters usually want to maintain eye contact with their camera operators, and radio reporters generally prefer to sit near the front of the room so they can adjust sound levels. Generally speaking, print journalists can sit anywhere. From a technical point of view, you should make sure that appropriate audio-feed facilities are available for all journalists who want to record the news conference. You usually set up these pool boxes or patch boards off to one side or in the middle in front of the cameras. These boxes or boards negate the need for every journalist to place a microphone in front of the spokesperson giving the news conference.

- **Anticipate frequent movement during the news conference.** Movement is a feature of news conferences which is often unexpected by those taking part for the first time. Radio reporters move about to change or adjust recording device sound levels, television-camera operators wander around looking for interesting angles, and photographers move back and forth to obtain a variety of pictures. Be prepared for movement, and brief the person giving the news conference accordingly.

- **Time the news conference well.** Ideally, news conferences should take place between 10:00 and 11:30 a.m. This allows assignment chiefs time to locate and assign reporters and gives media representatives enough time to prepare for the event. A late-morning news conference also ensures that night-shift personnel are off duty, and day-shift people are well into their workday. This timing permits editors and news directors to feature the material from the news conference on noon newscasts and in afternoon and early-evening editions. News conferences in the afternoon run the risk of being overtaken by fast-breaking stories. Also, media
representatives are sometimes late. The later a news conference is scheduled, the more likely reporters assigned to cover it will be delayed or reassigned to something else. In scheduling the date and time for the news conference, consider the competition from other scheduled events in the area.

2. **Procedure for Conducting News Conferences.**

News conferences follow a set procedure to ensure that the process is fair for both the organisation holding the news conference and the media. Within ACO and ACT, the following procedure for conducting news conferences shall be followed:

- Moderator and spokesperson meet before the news conference starts to discuss any final points. The moderator tells the spokesperson which media are in attendance.
- Main three messages to be made at the news conference are re-stated.
- At the five-minute point before the appointed start time of the news conference, the moderator introduces him/herself and outlines the procedure for the news conference and the ground rules. Media are usually generally given an opportunity for one question then a supplementary, if time permits.
- Moderator gives a one-minute warning before start of news conference. Reminds media to silence all IT equipment.
- Moderator introduces the spokesperson.
- Spokesperson gives the prepared statement.
- Moderator begins the Q&As session and reminds media of the “ground rules”.
- Q&As.
- Moderator announces “Last Question, please” / when time limit is met.
- Spokesman exits briefing room by the most direct route.
- Moderator ends news conference.
- Conduct follow-on interviews if appropriate.
- Debrief spokesperson.
- Evaluate news conference.
### Briefing Set-up Checklist

<table>
<thead>
<tr>
<th>Briefing Subject</th>
<th>Briefing Date</th>
<th>Briefing Time</th>
<th>Speaker</th>
<th>Briefing Location</th>
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</tbody>
</table>

#### Personnel Prep
- Speaker provided talking points and 5 good / 5 bad questions
- Speaker murder board conducted
- Facilitator selected and briefed
- Escorts selected and briefed
- Interpreters selected and briefed
- Rehearsal conducted

#### Site Prep
- Briefing area secure and separated from the HQ's/unit's operations centre or other sensitive spaces
- Briefing area separated from generators or other noise
- Briefing area large enough to accommodate anticipated audience with seating
- Adequate electrical power and outlets for video equipment
- Sufficient lighting and has it been checked/tested
- Suitable backdrop

- Are the following items on hand (as appropriate):
  - Podium
  - Public address system
  - Pointer
  - Computer w/ CD/DVD
  - Projector screen
  - Video Projector
  - VHS/DVD player/recorder
  - Television monitor
  - Lighting system
  - Visual aids
  - Maps of area of operation
  - News releases / press kits
  - Video camera or digital voice recorder to record briefing
  - Event catered or refreshments provided (as per funding regulations)

#### Sequence Plan
- Plan to secure media reception area
- Plan to search media representatives as they pass through security
- Plan to escort media representatives into briefing area
- Ground rules established by facilitator
- SMEs introduced
- Questions monitored and ground rules enforced
- Plan to escort media representatives to reception area when briefing complete
- After action review (AAR) completed and forwarded to CPAO
**General Layout for a News Conference**

- Appropriate Backdrop
- Spokesman’s Podium
- Interpreter’s Booth
- Media Seating Area
  - Adequate Seating
  - Translation Headsets
  - Media Kits in Seats
- Question Mic
- Audio Board with Splitter Box
- Video Camera Area
- Access to Power/Elec
- Media Registration Desk
- Media Kits
- Separate Entrance/Exit for Spokesman
- Separate Entrance/Exit for Reporter
- Media register, receive media kits and sign for headphones here
- Area for Digital Recorders
- Audio Speaker
- Lighting

---

**General Layout for a Press Conference**

- Appropriate Backdrop
- Spokesman’s Podium
- Interpreter’s Booth
- Media Seating Area
  - Adequate Seating
  - Translation Headsets
  - Media Kits in Seats
- Question Mic
- Audio Board with Splitter Box
- Video Camera Area
- Access to Power/Elec
- Media Registration Desk
- Media Kits
- Separate Entrance/Exit for Spokesman
- Separate Entrance/Exit for Reporter
- Media register, receive media kits and sign for headphones here
- Area for Digital Recorders
- Audio Speaker
- Lighting
## Annex 4-J  News Release Checklist

The following checklist highlights the considerations for preparing a news release:

### Decision Criteria
- Is the information newsworthy?
- Is it more appropriate to have a news conference to get this information out?
- For example:
  - Is the issue too complex for a news release?
  - In crisis situations, it is important to show that NATO has control of the situation and who is in charge, in which case a news conference may be more favourable.
  - Will a news release give the perception that the organisation is hiding something?
- Are we the appropriate organisation to be putting out this information? We do not speak for NGOs, our allies, other governments or civilians.
- Use news releases judiciously. Constantly posting releases with nothing substantive become ‘white noise’ and are soon ignored.

### Production
- Does the release answer the five Ws and two Hs? Are there any other details that should be included?
- Information arranged in descending order of importance (inverted pyramid)?
- Does the release simply state the facts and events - no adjectives or adverbs?
- Is the news release brief enough?
- Does the news release conform to the ACO style considerations?
- Is the news release on proper letterhead with the name of a contact person?
- Is the news release properly dated?
- Is the news release for general, immediate, or delayed release?
- Are the words ‘-END TEXT-’ positioned at the end of the news release?
- Are ‘Notes to the Editor’ positioned after the ‘-END TEXT-’?
- Make sure that you ‘accept all changes’ in the document and resave it to remove traces of earlier edits AND the DRAFT watermark.
- Have you checked that the contact phone number works what happens out of working hours? Is there a duty officer number?
- Has the news release been translated (if required and after approval)?

### Approval
- Have proper clearances by the chain of command been obtained?
- Is the PA TechNet aware?

### Release
- To whom will you send the news release? Have you given copies of the news release to all of the appropriate agencies?
- How will you issue the news release?
- When exactly will you release it?
- Have you prepared a web version of the news release?
- Will the release be posted on the social media sites?

### Post Release
- Is the original hard copy news release with original approval signatures on file?
- Is the final, approved electronic version of the news release filed in the office electronic archive?
General Breedlove Thanks Spain for PATRIOT Commitment

18 September 2014

MONS, Belgium — General Philip M. Breedlove thanked Spain for its recent decision to provide PATRIOT missile batteries and 130 soldiers to augment NATO’s defensive deployment in southern Turkey. The Alliance deployed six batteries in 2013 to augment Turkey's air defence capabilities to defend the population from ballistic missile threats emanating from the Syrian conflict.

Spanish Defense Minister Pedro Morenes announced the commitment on 17 September and said that Spain would collaborate by providing a similar number of assets as other Allies that are involved.

“I strongly welcome the Spanish commitment of PATRIOT missiles and troops to the NATO deployment in southern Turkey,” said General Breedlove. “The Alliance's southern border is located in a difficult neighbourhood and considerable instability remains in Syria and across the region. Spain’s clear demonstration of Alliance solidarity is critically important to the people of Turkey and for all members of the Alliance,” he added.

In January 2015, Spanish missiles and soldiers are expected to replace the two Dutch batteries deployed in Adana, Turkey. The Netherlands commitment began in early 2013.

“The Netherlands’ contribution to NATO’s PATRIOT deployment has been remarkable and the performance of Dutch soldiers has been outstanding,” said General Breedlove. The Netherlands deployed their PATRIOT batteries with remarkable speed at a very critical time and I am very grateful for their willingness to contribute to the collective security of the Alliance,” he said.

In response to Turkey’s request, NATO Foreign Ministers decided on 4 December 2012 that NATO would “augment Turkey’s air defence capabilities in order to defend the population and territory of Turkey and contribute to the de-escalation of the crisis along the Alliance’s border.”

Six Patriot missile batteries are currently operating under NATO command and control in southern Turkey. The Alliance rapidly deployed these assets in order to augment Turkey’s air defence capabilities to defend the population and territory of Turkey.

Two Dutch batteries are operating in Adana, two German batteries are in Kahramanmaras and two batteries from the United States are located in Gaziantep. Together, these Patriot batteries are actively defending 3.5 million people in Turkey against missile attacks.

This deployment is defensive only and represents a concrete demonstration of Alliance solidarity and resolve.

- END TEXT –
Annex 4-L  Media Advisory Example

SUPREME HEADQUARTERS ALLIED POWERS EUROPE
ALLIED COMMAND OPERATIONS
PUBLIC AFFAIRS OFFICE
SHAPE Headquarters, Rue Grande, 7010 Casteau, Belgium

MEDIA ADVISORY

NATO Operational Update

25 August 2014

CASTEAU, Belgium — Media are invited to an operational update briefing at SHAPE in Casteau (near Mons), Belgium on Thursday afternoon, 28 August 2014. The Supreme Allied Commander Europe (SACEUR), General Philip Breedlove, supported by SHAPE staff officers, will share information with reporters on Ukraine as well as on NATO operations.

SHAPE staff officers will brief on BACKGROUND (attributable to a “NATO Military Officer”), but the question and answer session with General Breedlove will be ON THE RECORD.

WHEN: Thursday, 28 August 2014.

Media arrival and security procedures: 12:45 hrs.

Operational Update (BACKGROUND) - 13:30 – 14:00 hrs.

Q&A with General Breedlove (ON RECORD) 14:00 – 14:30 hrs.

WHERE: SHAPE Headquarters, Rue Grande, 7010 Casteau (Mons), Belgium

NOTE TO EDITORS:

Registration Required: All media representatives must pre-register for this event by completing the attached registration form and returning it to the SHAPE Public Affairs Office (shapepao@shape.nato.int) NO LATER THAN 10:00 hrs on Wednesday, 27 August.

On 28 August, all media must arrive at the Berlin Gate visitor centre no later than 12:45 hrs to complete the security check-in. Media will be met by a Public Affairs Escort Officer at the Berlin Gate who will give directions to the appropriate parking and media set-up areas.

Participation by telephone is possible. Media can participate by telephone, but ONLY for the Q&A with General Breedlove. It will not be possible to participate in the operational update by phone. Media wishing to participate by phone should contact SHAPE PAO for details NO LATER THAN 15:00 hrs on Wednesday, 27 August at: shapepao@shape.nato.int

SHAPE Public Affairs:
Mobile: 0032 (0) 475 77 31 05
Email: shapepao@shape.nato.int

- END TEXT –
## Annex 4-M Interview Planning Guide

<table>
<thead>
<tr>
<th>Journalist's Name</th>
<th></th>
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<tbody>
<tr>
<td>Agency</td>
<td>Type of Medium</td>
</tr>
<tr>
<td>Office phone</td>
<td>Mobile phone</td>
</tr>
<tr>
<td>Email</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>What is the issue?</th>
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<tbody>
<tr>
<td>Which aspect is the focus?</td>
<td></td>
</tr>
<tr>
<td>What is the story or angle?</td>
<td></td>
</tr>
<tr>
<td>Who else is being interviewed?</td>
<td></td>
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<tr>
<td>How much is already known?</td>
<td></td>
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<tr>
<td>Does journalist need background information?</td>
<td></td>
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<tr>
<td>When will the story run?</td>
<td></td>
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<tr>
<td>What is the journalist's deadline?</td>
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<tr>
<td>Will the interview be live or edited for broadcast?</td>
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<tr>
<td>Where will the interview take place?</td>
<td></td>
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<tr>
<td>How will it be conducted?</td>
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</table>

<table>
<thead>
<tr>
<th>Summarise agenda and boundaries</th>
<th></th>
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<tbody>
<tr>
<td>Arrange a time when you will call the journalist</td>
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<tr>
<td>Determine who is the right person to be interviewed</td>
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<tr>
<td>Obtain authorisation if required</td>
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<tr>
<td>Prepare yourself</td>
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</table>
## SME Interview Preparation Worksheet

<table>
<thead>
<tr>
<th>Interview Subject</th>
<th>To be defined through negotiation process with journalist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Goal</td>
<td>What you wish to accomplish from the interview</td>
</tr>
<tr>
<td>What’s Your Position?</td>
<td>Opening statement that outlines your organisation’s view point</td>
</tr>
<tr>
<td>Theme</td>
<td>Choose a central theme that will appeal to your audience</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Who are the messages aimed at?</th>
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<tr>
<td></td>
</tr>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
<tr>
<td>3. Internal audience (your co-workers)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Main Messages (include for each: Sound Bites, Examples, Analogies)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. These are the main points to be addressed Message, Example, Evidence</td>
</tr>
<tr>
<td>2.</td>
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<tr>
<td>3.</td>
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### DEVELOP AND PRACTISE QUESTIONS AND ANSWERS

<table>
<thead>
<tr>
<th>5 Good</th>
<th>5 Bad</th>
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<td>1.</td>
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<td>2.</td>
<td>2.</td>
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<td>3.</td>
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<td>4.</td>
<td>4.</td>
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<td>5.</td>
<td>5.</td>
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</tbody>
</table>
Annex 4-O  Media Embedding Guidance to PAOs

1. Intent.

Consistent with Article 2 of NATO’s founding treaty, transparency and media access to operations and exercises is encouraged. Accommodating media through allowing access to operations – what is traditionally known in some member nations, as embedding with a unit – provides an opportunity for journalists to get a better understanding of the responsibilities and challenges faced by our forces and gives context to their reporting. Providing multi-national media with access is important as it broadens the scope of their reporting and provides audiences with an increased appreciation of the collaborative nature of allied operations.

2. Policy.

NATO does not have an agreed media embed policy and some nations are apprehensive about a directive embedded media policy for a variety of concerns such as the legal and medical ramifications, service member privacy, etc. For this reason, the NATO and ACO-ACT policy is that media embedding is predominantly a national program carried out under the respective national policies and procedures. When dealing with media embedding, PAOs working for NATO will always defer to those national policies.

Throughout MC 0457/2, the terms “integrated”, “embedded” and “hosted” media are used. For simplicity, ACO will use the term ‘embedded’ to refer to a unit hosting a media representative for more than a 24 hour period for the purpose of reporting operations.

For nations without established media embedding policies or ill-defined policies, this Handbook will provide recommendations and suggestions of best practices and a view as to what is acceptable to ACO and ACT.

3. Embed Requests.

PAOs who are approached by media to facilitate embedding should generally seek to do so at the lowest level possible either through the PA TechNet, through the chain of command in theatre or if necessary via the operational HQ/SHAPE. The decision to accommodate a journalist will be a command decision influenced by PAO recommendation.


Specific guidelines for the conduct of media embeds with deployed ACO units are as follows:

The goal of ACO is to provide the international community with as much accurate information as possible about NATO efforts. As such, requests will be prioritised using the following criteria:

a. Priority 1 – International media and wire services.

b. Priority 2 – National media relevant to the units in the AOR; and
c. Priority 3 – Freelance media. Freelance media, photographers and documentary filmmakers may not be embedded unless they are under contract to a media outlet that will publish/broadcast their material.

Embed durations will be agreed to prior to the journalist embedding with the unit. The commander approving the placement is the authority to grant or deny extensions. It should be made clear at the outset that extensions are not automatic and will be considered on a case by case basis.

5. Ground Rule Agreements.

“Ground rules” agreements will be signed by the embedding journalist and the ACO unit accommodating them. Deployed ACO units accommodating media should use either the national process and agreements for embedded media or the examples annexed to this chapter. Ground rule agreements are ‘gentlemen’s agreements.’ If and when “ground rules” are broken by media, severe repercussions other than discontinuing the embed status and restricting future access, transportation and assistance would be the exception rather than the norm.

It should be noted that although media may sign an indemnification agreement and liability waiver, such waivers may have limited utility. National laws concerning liability waivers differ. Consult a legal advisor familiar with the specific situation.

6. Accreditation and Registration.

Embedded journalists should be accredited by a media agency or organisation. Freelance journalists may embed but must have a letter from the agency or organisation that has hired them. All journalists will need a current, valid media ID card in order to be registered with an ACO theatre of operation. Journalists should have appropriate life and medical coverage to mitigate potential legal issues against the hosting nation.

7. Accommodation Authority and Agreement.

Nations may be willing to embed media proposed through an ACO PA office. The Commander of the hosting unit should seek any national approvals required. In the event that this cannot be resolved locally and the NATO PA office feels that the request is valid it should be referred to the next higher HQ for action.

As part of the embed agreement the media outlet and journalist must complete and sign the following documents:

a. ACO Ground Rules for Embedded Media on NATO Operations (see Annex 4-Q);

b. Indemnification Agreement and Liability Waiver (Annex 4-R);

c. Personal Biographical, Medical and Preference Statement (Annex 4-S);
Copies of these documents must be kept by the embedded journalist, theatre/operational PA office and the unit with which the journalist is embedding.

8. **Terminating Accommodation.**

The accommodating unit’s PAO, with acknowledgement from his/her immediate commander and higher headquarters CPAO may terminate the agreement early if an embedded journalist does not abide by the ground rules or if the operational situation changes and the arrangement is no longer workable. However, early termination of an arrangement without good reason may result in adverse publicity. The commander approving the placement must be conversant with the media “ground rules” when the initial request is made.

Embedded journalists will only be supported while they remain with the ACO unit or command. If a journalist leaves the formation or unit, even temporarily, to cover non-ACO related activities, that journalist will temporarily lose his embedded status. The individual and his media outlet will be responsible for their own safety in these circumstances. The commander in charge of the operation will be kept advised of any significant change to the status of embedded media through the theatre CPAO.

Subject to specific national embedding program policies, ACO reserves the right to deny, postpone or cancel any embed request and will not be liable for any expenses incurred by the journalist or media outlet in preparation for the embed programme, including the cost of airline tickets, vaccinations, passports, visas, etc.

9. **Ground Rules.**

The aim of media “ground rules” governing embedded media programs is to protect OPSEC and ensure that embedded journalists have clear guidance regarding what they can expect from the host unit and their overall embedding experience. The embedding media “ground rules” recognise the journalists’ right to report and are not intended to prevent the release of derogatory, embarrassing, negative or non-complementary information. There is no specific review process for media products within ACO, however some nations may demand factual review of media reports prior to publication/broadcast. With respects to OPSEC, PA staff may have grounds to review any reporting of potentially sensitive operational issues to ensure there are no breaches of security prior to release by the media and to the general public. The PAO’s objective should be to work with the journalist to remove the sensitive material in an amicable, professional manner. Content will not otherwise be restricted.

Should a journalist obtain photographs or video footage of operationally sensitive information or casualties the PAO should review the images, determine the risk to OPSEC or to proper next of kin (NOK) notification and either embargo the photos until release is deemed appropriate or if required for OPSEC demand that the journalist delete or record over the images. At no time will the PAO, an escort or any NATO personnel confiscate accredited, registered media’s camera or equipment.

Embedded journalists must understand the “ground rules” and agree to follow them. “Ground rules” will be agreed to in advance and the document acknowledging this will be signed by the embedding journalist and by an appropriate supervisor/representative.
of his media outlet prior to the embed. Violations of these rules may result in termination of embed status and removal from the ACO controlled area. A standard set of ground rules are at Annex 4-Q to this chapter. Journalists should be encouraged to carry a signed copy of the ground rules with them at all times while embedded.

10. **Disputes.**

Disputes on “ground rules” should be resolved as soon as practicable and at the lowest possible level through negotiation without recourse to any outside jurisdiction or third party. If the issue cannot be resolved locally, it will be forwarded through the chain of command to the theatre Commander through the theatre PAO for final decision.

11. **Administrative Requirements, Medical and Physical Fitness.**

Journalists must meet the following conditions prior to embed status approval:

a. Journalists should be medically certified that they are physically fit for travel, can withstand the climate, and can cope with the physical demands of the operation before arriving in theatre. Journalists are responsible for bringing any allergy kits and personal medication, and to advise the operational PAO and the specific formation or unit of any special medical requirements before finalizing the embed status agreement. The journalist must complete the Personal Biographical, Medical and Preference Statement at Annex 4-S;

b. Journalists selected for embedding are responsible for ensuring that they receive the proper immunisations specific to the AOR and are prepared to provide proper documentation to this effect;

c. Journalists should be physically fit and prepared to withstand the rigorous conditions required for the particular environment in which the NATO formation or unit will be operating;

d. Journalists are responsible for obtaining their own passports and visas and any additional life, medical and air evacuation insurances. Journalists or their employers will be responsible for costs incurred while in a civilian medical facility; and

e. Embedded journalists will provide personal information necessary for records purposes. This information will be accorded a protected category and will only be used for the purpose for which it was collected.

12. **Logistics.**

a. Out-of Theatre Transportation. In most instances, the journalist will be responsible for his/her own travel to and from the AOR and depending on national media embedding policies that are applying, may be required to pay for his/her own food and accommodations while on an embedded status. Journalists will not be allowed to use their own vehicles while operating with military units.
b. In Theatre Transportation. NATO forces may only provide transport to media representatives while they are covering ACO operations, events and activities. Journalists who choose to dis-embed to cover non-ACO events are responsible for their own transportation.

c. Rations and Billeting. Rations and billeting must be agreed upon with the host unit. The general principle is that the media should get the same treatment as a service member, with no special care or appeasement in order to give that journalist the best view of what service members are experiencing.

d. Level of Access. Level of access (escorted at all times, escorted part-time or unescorted) must be determined with the host unit and agreed upon by the PAO. It is the PAO’s job to explain this requirement to the journalist and a dual responsibility exists between the host unit and PAO to enforce the applicable level of access determined.


NATO forces will provide emergency first aid treatment to any media representative who has been injured while embedded with a NATO formation or unit in accordance with NATO or national regulations. Injured media who are also contaminated by nuclear, biological or chemical agents (NBC) may not be repatriated until the potential contamination risks are contained. Repatriation of journalists who have been killed or injured is the responsibility of the media organisation employing the journalist. Media outlets employing freelance journalists must pay particular attention to this responsibility.

Embedded journalists and the media organization they represent are responsible for ensuring they have adequate indemnity and insurance coverage.

If an embedded journalist is seriously injured or killed in the course of military operations the following procedures will be followed:

a. The chain of command and the PA office must be notified immediately. The death of a journalist while embedded with NATO troops would be a significant event and would generate important news coverage, therefore, the information must be passed swiftly up the PA chain, through PA duty staff, concurrently with chain of command notification.

b. The PA office will confirm the facts with the appropriate operational staff and then notify the national chain and the journalist’s parent media agency immediately to manage proper follow on NOK notification and the parameters guiding the release of information relating to the casualty.

c. The theatre headquarters PAO will act as the in theatre point of contact for the journalist’s parent organisation or nominated POC. In most instances national air assets would likely evacuate or repatriate journalists injured or killed while embedded with NATO troops but the primary responsibility lies with the journalist’s parent organisation or next of kin.

Journalists are responsible for bringing an appropriate carrying bag or rucksack for their own personal equipment, clothing, sleeping bag, personal protective equipment, and hygiene items. They should also provide their own environmental protection items (e.g. insect repellent, sunscreen), water bottle, flashlight, and eating utensils. All clothing and equipment must be subdued in colour and appearance.

While stationed at established bases of operation, ACO will provide rations, workspace and basic accommodation commensurate with that of the service member. Media may have access to morale facilities, mess, and postal services where they exist according to local policy. Embedded journalists should be aware that conditions of forward outposts or on board ships may be more austere than those found at established operational bases. The basic needs (security, food and water) of the journalist will be met to the greatest extent possible during forward deployed operations or when embarked; however, it should be understood that comfort, story filing/transmission and workspace limitations may exist.

15. Communications Equipment.

Embedded journalists must provide their own communications equipment. However, if these are unusable or if media Internet transmission capacity is absent or challenging, the Commander may authorize the use of unclassified military communications equipment for transmitting media products depending on operational tempo and availability of the equipment. The NATO aim in facilitating media access is to enable the journalist to report on the operation, therefore necessitating the ability to file stories and products. Restricting access to communications equipment must not be used as a deliberate means of censorship. Specific guidance should be included in respective Annex TT to the OPLAN Paragraph 5 (Command and Signal), and should be coordinated with the J-6.

In principle, no communications equipment typically used by media (e.g. mobile phone, satellite phone, wireless internet computer) shall be prohibited. However, the Commander may impose temporary restrictions on the use of those devices if temporary information embargoes need to be enforced, or in order to safeguard classified information or for other serious security or operational reasons. Unless specifically authorized by the Commander or a designated representative, media will seek approval to use electronic devices while on patrol or tactical missions to prevent the risk of undesired detection, electronic interference or detonation of signal initiated weapons.

16. Protection of Media and Equipment.

Journalists who have been granted embedding status with ACO will be accorded protection of their person and equipment as per authorized Rules of Engagement. It should be recognised that ACO in pursuing its mission cannot guarantee the personal safety of embedded media representatives or their equipment.

Journalists who leave the protection of an ACO facility or patrol to meet their organisation’s ‘fixers’ or support personnel do so at their own risk. ACO will not render any assistance to media when they leave ACO facilities, therefore these occasions should be kept to a minimum. If media wish to cover news outside of ACO facilities on
a regular basis, they should officially withdraw from embedded status so that other journalists may have the opportunity to cover ACO operations.

17. Media Access.

The aim of an embedding media program is to provide media access to relevant military operations and activities and allow journalists to report events on the ground and add proper context to their reporting. To that end, every effort must be made to allow embedded journalists to see a full range of activities undertaken in support of the mission, view the mission preparations and operations and speak to people who can explain NATO’s position. Some of these interactions with the media will be on background and others for attribution. However, as a matter of principle, every interaction with the media should be considered “on the record.” Moreover, staff should always be aware that even if an interaction with media is on background classified information is not for sharing with journalists.

A liaison officer may be assigned to large groups of media representatives. This person will be responsible for ensuring that the journalists are assisted while with the formation/unit and that they receive the appropriate support. The liaison personnel will also be responsible for assisting the media in observing activities once authorised by the commander.

18. Training and Briefings.

Journalists may be required to attend security/safety briefings before or when deploying into theatre and may be given additional briefings depending on the type of operation they may be anticipated to cover. Journalists will not receive weapons training.


ACO PAOs will release as much information as possible to the public commensurate with OPSEC and next-of-kin (NOK) notification requirements. OPSEC, patient welfare, patient privacy, and NOK/family considerations are the governing concerns related to release of information and media coverage of wounded, injured, and ill personnel located in medical facilities or other casualty collection and treatment centres. Permission to interview or photograph a patient, including those inside operating rooms during operating procedures, will be granted only with the consent of the attending physician or facility Commander and with the patient’s informed consent, witnessed by the person responsible for escorting the journalist. ‘Informed consent’ means the patient understands his or her picture and comments are being collected for news media purposes and that they may appear in any news media reports. The attending physician will confirm that the individual is medically capable of giving informed consent. When ‘informed consent’ is impossible to obtain, for example if the patient is unconscious, situations will treated on a case by case basis and final decision to allow media access will rest with the commander, in consideration of proper medical, legal and PA advice.

Media visits to medical facilities will be in accordance with applicable regulations, standard operating procedures, operations orders and instructions by national policies and attending physicians. When approved, media visits to a medical facility shall
include an escort. Visits must not interfere with any ongoing medical treatment or service.

The issue of missing persons is particularly important since it may be necessary to withhold information due to the security classification of the information (i.e. in anticipation of a rescue mission or the need to safeguard the information from an adversary in the event the person is trying to evade capture). A restriction on the access or an embargo on the release of information related to a missing person may be established in such cases.

20. Release of Information.

Ultimately, the Commander has the right in some specific and uncommon circumstances, to demand any reporting of potentially operationally sensitive issues reviewed to ensure there are no breaches of security prior to release by the media. Content will not otherwise be restricted. Technical information may be reviewed by a SME but will not involve editorial changes.

In the event that information of a personal nature is given to media during a briefing and the media are told that its release would likely result in a violation of national privacy legislation, ACO may choose to take legal action against a journalist who proceeds to release the information thus exposing ACO to potential liability. Media should also be aware that violations of media embedding "ground rules", particularly regarding force protection and the release of sensitive information may result in loss of embedded status.

21. Final Authority.

The ACO theatre commander is the final authority, through the chain of command, for the provision of support to embedded media and may add supplementary instructions or guidelines for accommodating embedded media.

22. Lessons Learned.

Media agencies and journalists should be encouraged to provide feedback on their experience with an embedding programme to ACO through proper ACO PA offices.
Annex 4-P  Recommended Media Accommodation Guidelines

ALLIED COMMAND OPERATIONS
GROUND RULES FOR EMBEDDED MEDIA ON NATO OPERATIONS

Introduction

In the spirit of transparency and the democratic ideals of open reporting, NATO’s Allied Command Operations encourages media coverage of its operations. In this context ACO has prepared these guidelines for use where national policies have not been established.

The following ground rules set out the terms upon which journalists are embedded within NATO operations and exercises (embedded media). If followed, they will help to ensure that embedded media activity does not adversely impact on operational security (OPSEC) and service member privacy. Likewise, they address certain practical matters with respect to the journalist’s health and notification procedures. They are not intended to prevent the release of negative coverage or embarrassing information. However, the rules necessarily restrict the release of certain categories of information which could provide information useful to an adversary and put military and civilian lives at risk.

Violations of any of the following rules may result, at the sole discretion of the first line Commander in termination of a person’s embedded status:

Administrative Issues

a. Passports, Visas and Travel. Embedded media are responsible for obtaining the required passports and visas for their entry into, and exit from, the area of operations.

b. Immunisation. Embedded media shall be immunised in accordance with World Health Organization recommendations for the region or country prior to deployment with NATO units.

c. Identification. Embedded Media must wear their NATO media credentials in a clearly visible place on their person at all times while in the AOR.

d. Personal Equipment. Embedded media are responsible for procuring and using personal protective equipment to include, as minimum, military-grade helmet and body armour. Clothing and equipment will be subdued in colour and appearance, but non-military in appearance. Embedded media are responsible for supplying, caring for, the security and carriage of, their own personal and professional equipment.

e. Media representatives, support staff, producers or personal protection teams will not carry firearms while embedded.
f. **Dispute Settlement Procedures.** Any disputes involving embedded media should be raised with the local NATO PAO point of contact. NATO PAOs will endeavour to resolve the issues and assist in their capacity of “honest broker” but the ultimate decision to accommodate embedded media is held by the Commander.

**Movement Rules**

g. Embedded media will not enter any classified areas e.g. Tactical operations centres or Intelligence cells without a military escort.

h. Embedded media will follow instructions regarding their activities and movements.

i. Embedded media working with national units under NATO command will be required to comply with relevant national military codes of conduct and rules for embedded media.

**Interview Rules**

j. All interviews with NATO personnel will be “on-the-record”. Security of information will be the responsibility of the NATO personnel being interviewed (principle of “security at the source”). Prior to any interview taking place, embedded media must inform the NATO member that he or she is being interviewed on the record. NATO personnel always have the right to decline an interview.

k. Interviews with NATO personnel are authorized and encouraged upon completion of missions and patrols; however, release of information remains subject to compliance with these rules.

**Release of Information and Embargoes**

l. Embedded media will exercise caution when datelining products to avoid releasing geographical location information which may jeopardise OPSEC. If in doubt advice should be sought from the PAO.

m. Information embargoes may be imposed temporarily to protect OPSEC. Embargoes will be lifted as soon as the OPSEC issue has been addressed.

n. Embedded media are to be self-sufficient with respect to filing their product. On occasion, embedded media may, subject to national regulations and availability limitations, be allowed to file products via military communications systems. Embedded media may not be allowed to connect privately-owned computers or USB thumb drives to military communications systems. Therefore, they should have the capability to burn to CD/DVD. Bandwidth limitations may restrict the ability to file video and large files.

o. The following categories of information **are** releasable, subject to the restrictions set out in Paragraph p. (below):

1) Arrival of NATO units in the AOO when officially announced;
2) Approximate friendly force strength figures;
3) Non-sensitive, unclassified information regarding air, ground and maritime operations, past and present;
4) The size, composition and capabilities of a force participating in an ongoing action or operation may be sensitive and Embedded Media should take care to avoid breaching OPSEC when reporting on those aspects of the operation. If in doubt advice should be sought from the PAO;
5) Generic description of origin of air operations, such as ‘land-based’;
6) Date, time, location and results of completed military operations and actions;
7) Types of ordnance expended in general terms;
8) Number of aerial combat or reconnaissance missions or sorties flown in the area of operations; and
9) Casualty reporting (subject always to the further instructions set out in these rules).
10) Weather and climatic conditions.

p. The following categories of information are not releasable:

1) **Force numbers and equipment.** Specific information on troop strength and capabilities, equipment or critical supplies (e.g. artillery, radars, trucks, water, etc.);
2) **Aircraft numbers and origin.** Specific number of aircraft in units below wing level, or identification of mission aircraft points of origin, other than land or carrier based. Number and type of aircraft may be described in very general terms such as ‘large flight’, ‘small flight’, ‘many’, ‘few’, ‘fighters’, ‘fixed wing’;
3) **Individual Identification.** Embedded Media will not report the identity of NATO personnel who kill or injure opposing forces without the prior approval of the theatre level CPAO;
4) **Operational Information.** Information regarding planned, postponed or cancelled operations – unless authorised by the CPAO. Extra precaution in reporting will be required at the start of an operation to maximize operational surprise. Therefore, broadcasts from airfields by Embedded Media are prohibited until authorised by the unit commander. During an operation, specific information on friendly force troop movements, tactical deployments, and dispositions that would jeopardise OPSEC or lives. Information about on-going engagements will not be released unless authorised by the on-scene commander. Any other information that, due to operational requirements, may be restricted from time to time when notified by the CPAO or first line commander.
5) Imagery that would show security precautions at military installations or camps, especially aerial and satellite imagery which would reveal the name or specific location of military units or installations;
6) **Rules of Engagement.** Details of the rules of engagement (ROE), escalation of force or force protection measures to include, but not limited to, those at military installations or camps, unless explicitly intended to be visible to non-combatants (such as warning signs);
7) **Intelligence Collection.** Information on intelligence collection activities including targets, methodology and results. Information on friendly forces electronic warfare equipment or procedures or friendly forces counter-IED activities;
8) **Search and Rescue Operations.** Information on missing personnel or sensitive equipment or downed aircraft while search and rescue and recovery operations are being planned and executed unless expressly authorised by the CPAO;
9) **Special Operations Forces.** Information on NATO Special Operations Forces in the area of operations. Embedded Media will not interview, photograph, film or report on NATO Special Operations Forces or operations they conduct or participate in, without prior approval of the NATO Special Operations Forces Commander;

10) **Enemy Forces Information.** Information on effectiveness of enemy camouflage, deception, targeting, direct and indirect fire, intelligence collection, electronic warfare or security measures; and

11) **Detainees.** All imagery of detainees or any transport of detainees will respect the detainee’s rights, and protect the detainee from public curiosity in accordance with the principles of Article 13 of the Third Geneva Convention. No visual media showing a detainee’s recognisable face, nametag or other identifying feature or item may be taken.

**OPSEC Issues**

q. **Light Sources.** Visible light sources and infra-red devices, including flash or television lights, will not be used when operating with NATO personnel at night unless specifically approved, prior to the commencement of the operation, by the on-scene commander.

r. **Noise Discipline.** Embedded Media will follow instructions to comply with tactical movement and noise discipline requirements while covering operations.

s. Although the use of communications equipment (such as cell phones) is not generically prohibited, unit commanders may impose temporary restrictions on their use for OPSEC reasons. Embedded Media will comply with such temporary restrictions.

t. If, in the opinion of the unit commander, Embedded Media do not meet the requirements to operate within a particular environment, or in doing so would put the safety of their or other personnel at risk, the unit commander may limit or prevent the Embedded Media’s participation in an event or operation.

u. **Visual Recording Exclusions.** The following will not be visually recorded without the explicit approval of the local Chief Public Affairs Officer (CPAO) and the local NATO commander:

1) Restricted military areas, facilities or installations, such as operations centres and perimeter security measures;

2) Images of maps, navigation devices, communications equipment or Counter Improvised Explosive Devise/Electronic Warfare equipment. Care should be taken in tactical vehicles to ensure these categories of sensitive equipment are not documented;

3) Classified systems, equipment or demonstrations of capabilities;

4) Any flight line (being any runway, storage area, control tower or related facility or equipment) in the area of operations and military aircraft operating on or near it. Embedded Media will adhere to specific rules relating to coverage of ramp ceremonies for deceased personnel. Such rules will be briefed prior to each ceremony.
Medical Treatment and Fatalities

v. Injury or Death of Embedded Media. NATO forces will provide immediate emergency medical treatment and evacuation to an appropriate medical facility. If Embedded Media are injured or killed in the course of military operations, NATO will notify the injured or deceased’s nominated emergency point of contact in accordance with instructions provided on the accommodation application. That point of contact will be responsible for further notification of next of kin. Repatriation of Embedded Media who have been killed or injured is the responsibility of the media outlet employing the journalist. Media outlets employing freelance journalists must pay particular attention to this responsibility.

w. Casualty Reporting. Unless otherwise advised by the host unit CPAO or commander, the following procedures and policies apply to coverage of dead, wounded, injured, and ill NATO personnel (NATO casualties).

1) Embedded Media will follow national policies for release of names and identity of NATO casualties. National policies differ from nation to nation, the detail of which are beyond the scope of these rules. However, Embedded Media who witness the deaths and injuries of NATO personnel will not disclose, through any medium, the identities of the NATO casualty until the relevant nation has notified next of kin. Because of the particular sensitivities involved in releasing information about NATO casualties, Embedded Media should contact the CPAO for release advice.

2) Embedded Media will not be prohibited from reporting on casualties provided the following conditions are met:

   a) Names, video, identifiable written/oral descriptions or identifiable photographs of NATO casualties will not be released without the casualty’s prior written consent. If the casualty dies, next-of-kin reporting rules then apply.

   b) National policy dictates the policy on release of names of the death of NATO personnel in the area of operations. In respect for family members, names or images identifying NATO personnel who die in the theatre of operations will not be released prior to national notification of next of kin. The names of NATO personnel who die in the theatre of operations may be released after the national announcement has been made. Embedded Media should contact the CPAO for release advice.

3) Media visits to medical facilities are authorised and will be conducted in accordance with applicable national regulations, standard operating procedures, operations orders and instructions by attending physicians. If approved, service or medical facility personnel must escort media at all times.

4) Patient welfare, privacy, and next of kin/family considerations are the governing concerns of news media coverage of the wounded, injured, and sick in medical treatment facilities or other casualty collection and treatment locations.
5) Permission to interview or photograph a patient will be granted only with the consent of the attending physician or facility commander and with the patient's expressed, informed consent, which must be, witnessed by the escort. ‘Informed consent’ means the patient understands his or her picture and comments are being collected for news media purposes and that they may appear in news media reports.

Conclusion

x. In the event of any doubt as to the requirements placed upon Embedded Media by these ground rules clarification should be sought through the Public Affairs Office which facilitated the placement.
I, (print) _____________________________________, confirm that the following information is accurate:

a. “I am not aware of any existing physical or health conditions which would adversely affect my participating in strenuous activities.”_______ (Initial) (Medical certificate is enclosed)

b. “I have read the media ground rules provided to me by Allied Command Operations (ACO) Public Affairs staff and agree, with my signature, to abide by them. I also understand that any violation of these ground rules is cause for the revocation of my accommodated media status with Allied Command Operations.”________ (Initial)

<table>
<thead>
<tr>
<th>Journalist’s Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media Organisation</td>
<td>Bureau Address</td>
</tr>
<tr>
<td>Media Outlet Supervisor Signature</td>
<td>Date</td>
</tr>
<tr>
<td>ACO Witness Signature</td>
<td>Date</td>
</tr>
<tr>
<td>ACO Witness Printed Name</td>
<td>Rank</td>
</tr>
</tbody>
</table>
Indemnification Agreement and Liability Waiver

1. I, ___________________________________ (PRINT NAME), on behalf of myself, my heirs, my executors and administrators, in consideration of being permitted to become registered as an embedded journalist with NATO’s Allied Command Operations (ACO) from on or about _______________________ (insert start time and date) to on or about _______________________ (insert end time and date) at ________________ (insert location) and the surrounding area.

2. Acknowledge and agree that covering combat and other military operations is inherently hazardous and may result in death, personal injury, whether physical or otherwise, or damage to property, and wishing in any event to participate in covering combat and other military operations, voluntarily consent to participate and assume any risks that may be associated with said participation.

3. Acknowledge, agree and declare that I have been advised of the nature of covering combat and other military operations, that I have been advised of the procedures and safety measures in effect and that I agree to abide by them.

4. Acknowledge, agree and declare that I have been advised that NATO’s Allied Command Operations, in pursuing the successful accomplishment of its mission, cannot guarantee my personal safety or the safety of my equipment.

5. Waive all claims of any nature or kind, including, but not limited to claims for personal injury or damage to property, against NATO, Allied Command Operations, Supreme Headquarters Allied Powers Europe, and its military personnel and civilian employees, in any manner arising out of, based upon, occasioned by, attributable to or connected with my participation in covering combat and other military operations while being an accommodated media:

   a. Agree that I will not commence or maintain against any person, any action or proceeding which will give rise to a claim against NATO, Allied Command Operations, Supreme Headquarters Allied Powers Europe, and its military personnel and civilian employees for contribution or indemnity;
b. Acknowledge, agree and declare that my signing this agreement is a condition to being registered to cover NATO’s Allied Command Operations missions and receiving assistance for that coverage; and

c. Acknowledge having read this liability waiver in its entirety and, understanding that this waiver is intended to be broad and all inclusive so as to preclude any claims, I voluntarily indicate my acceptance of this document by my signature.

Dated: (DD/MM/YYYY)

<table>
<thead>
<tr>
<th>Media Member:</th>
<th>ACO Member – Witness:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Print Name)</td>
<td>(Print Name)</td>
</tr>
<tr>
<td>(Address)</td>
<td>(Rank, Unit/Organisation)</td>
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<tr>
<td>(Tel)</td>
<td>(Tel)</td>
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<td>(Mobile)</td>
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<td>(Email)</td>
<td>(Email)</td>
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</tbody>
</table>

Signature of Media Outlet Supervisor (Assignment Editor, News Director)  
(Print Name)______________________  Date  
____________________________   

**Annex 4-R Example Journalist’s Biographic, Medical and Preference Statement**

<table>
<thead>
<tr>
<th>Media Personal Information Sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Journalist Information</strong></td>
</tr>
<tr>
<td><strong>Full name (print):</strong></td>
</tr>
<tr>
<td><strong>Address:</strong></td>
</tr>
<tr>
<td><strong>E-mail Address</strong></td>
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<tr>
<td>Phone (Mobile)</td>
</tr>
<tr>
<td>Phone (Land)</td>
</tr>
<tr>
<td><strong>Organization</strong></td>
</tr>
<tr>
<td>Date of Birth and Age</td>
</tr>
<tr>
<td><strong>Height</strong></td>
</tr>
<tr>
<td>Place of Birth</td>
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<tr>
<td><strong>Weight</strong></td>
</tr>
<tr>
<td>Blood Type</td>
</tr>
<tr>
<td><strong>Nationality</strong></td>
</tr>
<tr>
<td>Passport Number</td>
</tr>
<tr>
<td><strong>Place of Issue</strong></td>
</tr>
<tr>
<td>Date of Expiry</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Employer Information</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name of Organization</strong></td>
</tr>
<tr>
<td><strong>Address</strong></td>
</tr>
<tr>
<td><strong>Supervisor</strong></td>
</tr>
<tr>
<td><strong>Supervisor's Location</strong></td>
</tr>
<tr>
<td><strong>E-mail Address</strong></td>
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<tr>
<td>Phone (Mobile)</td>
</tr>
<tr>
<td>Phone (Land)</td>
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</tbody>
</table>
**Personal Emergency Notification** - Emergency notification is the responsibility of the media outlet. Who at your media outlet do you suggest to perform this function?

<table>
<thead>
<tr>
<th>Primary Agent</th>
<th>Full name (print):</th>
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</thead>
<tbody>
<tr>
<td>Address:</td>
<td></td>
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<tr>
<td>E-mail Address</td>
<td></td>
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<tr>
<td>Phone (Mobile)</td>
<td>Phone (Land)</td>
</tr>
<tr>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>Relationship</td>
<td>I authorise the PAO to contact this person in case of an emergency</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Secondary Agent</th>
<th>Full name (print):</th>
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<tbody>
<tr>
<td>Address:</td>
<td></td>
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<tr>
<td>E-mail Address</td>
<td></td>
</tr>
<tr>
<td>Phone (Mobile)</td>
<td>Phone (Land)</td>
</tr>
<tr>
<td>Organization</td>
<td>I authorize the PAO to contact this person in case of an emergency</td>
</tr>
</tbody>
</table>

I declare that the above statements are, to the best of my knowledge, correct.
Signed ___________________________ Date ________________
Witnessed ___________________________ Rank __________________
(ACO member)
Medical History Questionnaire –
Civilian Media Accommodated with Allied Command Operations

Name ___________________________________________ Age ____________
Gender: Female  Male
Smoker: Yes  No
Current Medications: (Name / Dose / Frequency)

Medication Allergies:

Environmental Allergies:

Past Medical History:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Yes / No</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>Angina</td>
<td></td>
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<tr>
<td>Heart Attack</td>
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<tr>
<td>Cardiac Arrhythmias</td>
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<tr>
<td>Asthma</td>
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<tr>
<td>Chronic Bronchitis</td>
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<tr>
<td>Emphysema</td>
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<tr>
<td>Asthma</td>
<td></td>
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<tr>
<td>High Blood Pressure</td>
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<tr>
<td>Kidney Stones</td>
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<tr>
<td>Hypothyroid</td>
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<tr>
<td>Hyperthyroid</td>
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<tr>
<td>Depression</td>
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<tr>
<td>Diabetes</td>
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<td>Hypoglycaemia</td>
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<tr>
<td>Other Psychiatric Illnesses</td>
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<td></td>
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<tr>
<td>Surgeries (list)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Physician’s Comments:

I certify that ____________________________ is in good general health, and has no medical ailments that would impede their ability to accompany NATO’s Allied Command Operations units on deployed operations in their theatres of operations.

_________________________________
Name (please print)

_________________________________
Signature

_________________________________
Date
### Annex 4-S  Media Escort After-Action Report

This After-Action Report serves as the official record of the media contact / escort mission. The report will assist the PAO Staff track and analyse the operation environments and enable improvement of media operations. Complete the AAR format as completely and with as much detailed information as possible. Forward completed AAR Form to the through your chain of command to the PAO.

<table>
<thead>
<tr>
<th>Unit Reporting</th>
<th>Date Submitted</th>
<th>PAO Control #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Completing Report</td>
<td>Phone Number</td>
<td>E-mail Contact</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Who</th>
<th>Media Reps’ Names</th>
<th>Media Reps’ Agencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
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<td>2.</td>
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<td>3.</td>
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<td>4.</td>
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<tr>
<td>5.</td>
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<table>
<thead>
<tr>
<th>What (Event Name)</th>
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<table>
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<tr>
<th>When</th>
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<table>
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<th>Where</th>
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<table>
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<tr>
<th>Why</th>
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<table>
<thead>
<tr>
<th>Media’s Story Angle</th>
<th>Story Publication Date</th>
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<table>
<thead>
<tr>
<th>Comments on Reporter(s)</th>
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<table>
<thead>
<tr>
<th>Additional Comments / Lessons Learned</th>
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<tr>
<th>Overall Assessment of Impact on Operations</th>
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Annex 4-T Example of Media Registration Form

<table>
<thead>
<tr>
<th>MEDIA REGISTRATION FORM</th>
</tr>
</thead>
<tbody>
<tr>
<td>(INSERT NAME OF HEADQUARTERS)</td>
</tr>
<tr>
<td>PUBLIC AFFAIRS OFFICE</td>
</tr>
<tr>
<td>(INSERT ADDRESS)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TEL: (complete)</th>
<th>FAX: (complete)</th>
<th>E-MAIL: (complete)</th>
</tr>
</thead>
</table>

**Name / Nom:**

**First Name / Prénom:**

**Date of Birth / Date de Naissance (DD/MM/YY):**

**Place of Birth / Lieu de Naissance:**

**Nationality / Nationalité:**

**Passport or National ID Number / N° du Passeport ou Carte National d’Identité:**

**Issued by / délivré par:**

**Press Card Number / N° de la Carte de Presse:**

**Issued by / délivrée par:**

**News Agency / Organe de Presse:**

**Country of News Agency Organisation / Pays de l’Organe de Presse:**

**Office Address / Adresse du Bureau:**

**Street / Rue:**

**Postal Code & City / Code Postal et Ville:**

**Telephone / Téléphone:**

**FAX / Télécopieur:**

**E-Mail:**

Please mark the appropriate answer / Prière d’indiquer la mention convenable:

- Newspaper / Presse écrite
- News Agency / Agence de Presse
- Photographer / Photographe
- Reporter-Online / Rédacteur en ligne
- Television, Films (news) / Télévision, Cinema Actualités
- Reporter / Rédacteur
- Cameraman / Caméraman
- Technician / Technicien
- Radio

**Date(s) of your visit / Date(s) de votre visite (DD/MM/YY):**

**Other Remarks / D’autres Commentaires:**

**Place, Date / Lieu, Date**

**Signature**
Chapter 5

Internal Communications / Command Information (Core Function)

“Internal Communications efforts facilitate communication with and among NATO military and civilian personnel and their families. Its purpose is to inform about the command or HQ, its people and its activities, and is distinct from administrative information or direction from the chain of command that is normally found in administrative or routine orders. Effective programmes to keep internal audiences informed about significant developments that affect them and the work of their HQ creates an awareness of the organisation’s goals and activities, improves work quality, and makes command personnel more effective representatives of the organisation.”

– MC 0457/2

5.1. Introduction. Perhaps more than any other function, internal communications to key audiences (e.g. NATO military and civilian personnel and their families) is both a chain of command and a collective responsibility that cuts across all levels of ACO and ACT. Investment in effective internal communications is essential; staff personnel who feel well informed and consulted are more effective in supporting the organisation’s objectives and can be empowered as effective ambassadors for the organisation. Well-informed personnel carry considerable credibility with external audiences and enhance the reputation and relevance of the Alliance. Of note, the rules governing the release of information and information security should be considered when communicating internal messages to external audiences outside of ACO/ACT and NATO.

5.2. Components. There are two components of internal communications: organisational communications and directions via the chain of command by commanders and other organisational leaders; and internal information co-ordinated by PA staff. Both are integral to a co-ordinated and effective internal
communications plan and efforts by both commanders and PA personnel should be well coordinated.

5.3. **Organisational Communications.** Leaders at all levels of ACO and ACT must strive to pass information quickly through the chain of command to their subordinates. Surveys conducted by various organisations have shown that individuals generally trust the information they receive from their immediate supervisor; efforts must be made to maximise this method of information passage. Face-to-face is always the best and most effective form of internal communications. Other organisational communications vehicles include e-mail, orders, groups, conferences, routine guidance, internal publications (including internal web sites) and other directives. Consistent and continuous effort must be made at all levels and via a variety of communications vehicles within ACO and ACT to keep members informed of issues that affect them.

5.4. **Internal Information.** The second component, coordinated by PA, supplements information passed by the chain of command and reinforces the leadership messages. When people are informed, they feel invested in the organisation, as well as a sense of ownership over issues that affect them.

5.5. **Integration.** The ability to communicate effectively within an organisation is as important as the ability to reach the external public. Large organisations like NATO are involved in numerous operations, and employ thousands of people. Rules, regulations, guidelines, operating procedures, formal orders, as well as corporate objectives, messages, and news, must all be passed on to ACO and ACT units and individuals. Therefore, internal communications must be integrated into our chains of command, fully integrating PA into the decision-making process for policy development, service delivery, and military operations.

5.6. **PAO’s Role.** ACO and ACT PAOs have a key role in supporting internal communications by:

a. Aligning effective internal communications strategies and efforts with the overall communications strategy for the organisation. An internal communications strategy is not a standalone function and must be aligned with all other communications functions so that the internal audience can be informed prior to members of the media and public. This avoids personnel being informed of key issues that impact changes/events on the television or in the newspaper;

b. Incorporating internal communications into PA plans. This could be as simple as the commander walking around the HQ and informally talking to staff, holding regular ‘town hall’ meetings so the commander can update staff on organisational priorities and operations followed by a Q&As session, or posting a story with photos on the organisation’s internal ‘homepage’;

c. Allocating adequate personnel and equipment resources to internal communications to achieve planned objectives;
d. Including internal communications when implementing PA plans and programmes;

e. Supporting NATO-wide ‘corporate’ internal communications programmes, as required; and

f. Facilitating two-way internal communications to the extent possible. It is important that personnel feel that they have a medium in which to ‘feed’ ideas/information up their chain of command.

5.7. Internal Communications Tools.

a. The following are tools that can be used for internal communications efforts to inform NATO military and civilian members and their families. Please note that this is not an all-inclusive list, and also that some methods are more effective in some situations than other methods. The range of methods used by HQ commanders and PAOs to deliver internal information will ultimately depend on the preferences of both commanders and PAOs, as well as available resources, time and technology, and PAO initiative:

- Face-to-face (one-on-one) – briefings.
- Personal phone calls.
- Face to face (group) – road shows/clear lower decks/mass briefings.
- Voice mail.
- Display/notice boards/screens (for messages and staff updates).
- Audio messages.
- Internal communications DVDs.
- Visual email (video).
- Email – mass distribution emails.
- Mail.
- Intranet / e-newsletters.
- Internet.
- Targeted paper newsletter.
- General audience newsletters.
- Mass media.

5.8. Writing Standards. When writing internal communications products, such as newsletters or content for the Intranet, apply the basic journalism standards. See Enclosure G, Basic Journalism and ACO Style Guide.

5.9. Conclusion. ACO’s /ACT’s personnel are ACO’s/ACT’s ambassadors in their local communities. By keeping our personnel informed of operations, events, and policies, they can help pass NATO’s message to other key audiences.
Annex 5-A Feature Story Examples

1 August 2014

NATO ships arrive in Canada for task group exercises

Three ships from the Standing NATO Maritime Group Two (SNMG2) arrived in the port of Halifax, Canada, for a scheduled port visit ahead of exercises with U.S. and Canadian navies on Thursday, July 31, 2014. The exercise in North America is to test the readiness of NATO’s naval forces through joint training, said the Group Commander, Rear Adm. Brad Williamson.

“I look forward to operating with the U.S., Canadian, German and Turkish units participating in this exercise,” he said, adding that Task Group Exercise is one of the many opportunities “to foster trans-Atlantic interoperability and further enhance the readiness of NATO forces.”

The SNMG2 currently consists of the U.S. flagship USS Leyte Gulf, the German ship FGS Niedersachsen, and the Turkish ship TCG Kemalreis. HMCS Regina, a Canadian ship, also serves under the group and remains in the Mediterranean in support of NATO’s maritime security operations in the region.

The Task Group Exercise is a multi-day exercise featuring anti-air, anti-submarine, and live fire and ship-handling exercises designed to provide high-end warfare training and valuable experience. SNMG2 is permanently available to NATO to perform a wide range of tasks. Composition of the force varies as allied nations contribute assets on a rotational basis.

Over the next few weeks, the group will participate in intensive training events in the western Atlantic. SNMG2 will exercise jointly with U.S. carrier strike groups and other forces of the U.S. and Canadian navies. SNMG2 will be led by a U.S. Navy admiral and flagship for one year.

HQ ARRC helps soldiers to assist with flood relief

Innsworth, UK, 17 Feb 2014 – Late last week, soldiers from Headquarters Allied Rapid Reaction Corps (HQ ARRC), ARRC Support Battalion sprang into action to prepare Imjin Barracks to support British soldiers recently mobilized to help with relief efforts in the local area affected by rising flood waters.

Headquarters, Allied Rapid Reaction Corps (HQ ARRC) is a NATO Rapid Deployment Corps headquarters, founded in 1992 in Germany, and headquartered in Gloucestershire since August 2010.

For more than six weeks most of England has been hit by harsh storms that have been devastating to many of the country’s citizens. Recently, it was estimated that 70% of public service agencies have been deployed across the UK.
Extensive flooding has affected wide areas of Southern England with the southwest coast, Somerset Levels, Thames Valley and Severn Valley areas most severely affected. Consequently, the Army has prepared to deploy military personnel to provide support to the communities affected by the barrage of bad weather.

"HQ ARRC’s major role in the relief efforts will be to facilitate more than 150 soldiers on Imjin Barracks," said Maj. Nicholas Stamford, Commander, 14th Squadron. Imjin’s gymnasium will be used as a sleeping area for the troops and cots have been set up for them to occupy until their duties are complete.

Soldiers with 2 Royal Welsh have been attached to 3rd (UK) Division under the command of 43 Wessex Brigade to provide additional man power for relief efforts.

"They will support the civil authorities with local flood defences," said Stamford.

Although Gloucestershire hasn’t been hit as hard by the bad weather as some neighbouring counties, a number of communities have been flooded and county authorities have been working hard to protect local people.

Meanwhile, the county’s district and borough councils are ready to stand up rest centres if required, working with the local services.

Civilians in most of the hard hit areas have already been evacuated and people are consistently trying to protect their homes and families.

Two-hundred and fifty tons of sand will be used to fill an estimated 20,000 sandbags that will be sent to the Tewkesbury area in support of relief efforts.

Maj. Stamford said the soldiers will remain at Imjin Barracks as long as their assistance is needed.

– END TEXT –
Chapter 6

Community Relations
(Core Function)

“Community Relations programs are associated with the interaction between NATO military installations in NATO member states and their surrounding civilian communities. These programs can take the form of addressing issues of interest to and fostering relations with the general public, business, academia, military-related associations, and other non-news entities.”

– MC 0457/2

6.1. Why Community Relations. Active CCOMREL programmes enable commanders to enhance morale, public trust, and support. Military personnel involved in the communities where they live become front-line ambassadors for NATO. Through active programs, NATO demonstrates it is a community partner and a responsible steward of resources.

In order to effectively manage misunderstandings and disagreements that may arise from time to time between NATO military installations and their surrounding communities, it is important to foster and maintain personal relationships between both groups.

The most amicable relationships, established at the Commander-Mayor level can be seriously damaged overnight by the thoughtless or insensitive actions of a small group, or even one individual. Having no relationship at all with your local community can be disastrous during a crisis. The case study at Annex 6-A demonstrates the value of a strong community relations programme. To that end all ACO units shall develop a community relations program with their local community.

Outreach, both at garrison and deployed locations/units, can be as simple as small groups of people on the installation independently providing support to organisations or families in the surrounding communities. This form of community interaction often
happens with and without PAO knowledge. It is best that PAO work to track these activities to capitalise on them in future references with the media and also to be aware in case friction arises between the two entities or others.

6.2. **COMREL while deployed – Key Leader Engagements (KLEs).** In a deployed environment, COMREL may take the form of KLEs or outreach programs. Consult with the J-9, CIMIC, Info Ops and Legal Advisors to ensure that you stay within the PAO lane when getting involved in non-traditional COMREL activities.

A KLE typically involves gathering local community leadership together to discuss issues impacting the battlespace environment. Examples of KLE in operations include:

a. The senior NATO Commander meets with high level political and military officials to share future plans for military deployments or withdrawal of troops in order to coordinate governmental support of smooth transition between international and indigenous forces.

b. Regional Commander meets with the local provincial police chief to ensure that respective standards of conduct are understood.

c. Local leaders from a coastal village in Somalia meet with the crew onboard a NATO counter-piracy warship to establish an open lane of communication with the local population of coastal Somali villages.

d. A Task Force level Commander meets with a local religious leader to foster a sense of cooperation and to assess how the local population perceives the task force presence.

PAO needs to maintain awareness of the other players, both NGOs and GOs, and stay abreast of the issues and areas of responsibility that can cause friction if crossed. Many NGOs have highly developed skills and understandings of the local areas and might know how to interact with the culture better than a recently deployed military force. However, keep in mind that most NGOs do not want to be perceived as interacting with the military because it gives the appearance of collusion, thus making them a target for insurgents or tarnishing their reputation as independent entities. Approached with sensitivity, they may be prepared to develop constructive relationships and share some information, but will probably be very keen to avoid any publicity.

When deployed, military members, families and home station civic organisations often enjoy collecting clothes, toiletries and toys to give away at locations where they are needed most, such as refugee camps and orphanages. This may be a rewarding experience for the military members and done with the best of intentions to help people that need these items, but it can cause repercussions for the local governments, tribes, refugee community and organisations that oversee these issues (such as the United Nations High Commission for Refugees). Likewise, actions like these occasionally present logistics issues that the PAO cannot solve without significant assistance from outside of his immediate control.
6.3. **Planning Considerations.** COMREL can be very effective when done correctly. Prior to engaging in a COMREL event, consider the following:

a. **Know Your Organisation.** Before conducting COMREL, it is critical to understand the history, purpose and objectives of your military organisation (NATO military installation). Make sure you know what past issues have shaped the current relationship that exists with the community. Identify the military units that comprise your organisation and the principal decision makers.

b. **Know Your Community.** It is equally critical to know your local community; specifically, what it knows and thinks about your organisation. To this end, a community-survey file can help you structure some of the information you need to gather to better understand your community. A community-survey file template can be found at Annex 6-B.

c. **Building Better Relationships.** To help you foster and maintain the relationship between your military organisation and your local community, the following five elements should be included in your COMREL program:

   (1) **Networking:** building an extensive network of contacts within the community is the first step towards developing a strong relationship. Find opportunities within the community to go out and meet community stakeholders.

   (2) **Presentations:** presentations allow one-on-one contact between the community and military leaders. Identify opportunities to make or organise presentations to the community that inform them about the issues that most concern them. During these presentations, continue to build on your network of community contacts by inviting your stakeholders to bring along a guest.

   (3) **Community Events:** being seen in the community is important to building and maintaining a strong relationship. To that end, with the help of your community stakeholders, identify community events in which members of the NATO military installation can participate.

   (4) **Special Events:** invite the community onto the base or ship to provide them with an opportunity to meet military personnel in an environment that is both new and interesting. An example OPORD for an installation open house is at Annex 6-E.

   (5) **Local Media:** the local media can have a strong influence on the community, and may represent an excellent way of communicating with it. You will likely meet local media at community events. Over time, your relationship with the local media will provide you with a greater understanding of the community, and will allow you to communicate more effectively with the community.
d. **COMREL Event Sponsors.** At times it may be appropriate to co-host a COMREL activity or have an event sponsored by a local group. In these circumstances, ACO/ACT directives and regulations on contracting and partnering must be observed. Prior to involvement with these activities, a PAO should ensure:

1. The event does not appear to endorse, selectively benefit or favour, any private individual, special interest group, business, religious, ideological movement, commercial venture, political candidate, or organisation;

2. The event does not solicit votes in a political election; and

3. Does not endorse commercially sponsored events intended to increase sales and business traffic (such as a business, mall grand opening, motion picture promotion, etc.).

Confer with the legal advisor prior to committing to support to such events.

e. **COMREL / Base Tour General Guidelines.** Tours tell a portion of the NATO story to visitors and should be tailored to coincide with the interests of different age groups. Often referred to as civic leader tours, the audience is composed of key community leaders connected to a local issue or where general civic education can be justified.

Include participants from a cross-section of community or business leadership (consider age, gender, race, ethnic and occupational backgrounds). Theme-based tours, such as environmental, small business, personnel, education, to name a few, can be excellent ways to focus in on key community leaders and their issues without diluting the message by doing a broad-based tour. Community and opinion leaders who can influence public opinion for the theme/objective selected for the tour, or inform and educate their communities and peers, should be considered.

For all tours, specific communication objectives should be developed. Limit time spent in briefings and increase contact with people and operations.

Orientations, demonstrations and briefings should be scheduled during normal duty hours as much as possible so the impact on your personnel's off duty hours is limited. PAOs working with SMEs shall ensure that all briefings, demonstrations, and orientations are security cleared for presentation to the general public.

A planning checklist for base tours is at Annex 6-F.
Annex 6-A Case Study:

Community Relations - an Essential Part of Public Affairs
by LT Cappy Surette, U.S. Navy (1999)

Let me offer one word that demonstrates how vital a solid community relations (COMREL) plan is — Vieques. In a Nov. 4, 1999, press briefing, Secretary of Defence William Cohen told reporters that the Navy was at least partly at fault for the crisis.

"The Navy has not really done a very good job in their relations with the people of Vieques and Puerto Rico," said Cohen. "We hope to do better in that regard."

What happened in Puerto Rico could just as easily happen elsewhere should we not learn from it.

The necessity of a good program was driven home to me as the firestorm of public outrage erupted Feb. 3, 1998, after a Marine EA-6B Prowler severed a cable car line near the Italian ski resort of Cavalese killing 20.

As U.S./Italian bilateral relations deteriorated as a result of this accident and the highly publicized trials that followed, it became abundantly clear just how necessary it was to have good relations with our local communities before something like this happens.

The importance of interacting with the local Italian community to promote trust had never been greater. The Cavalese cable car incident presented us with the challenge of mending fences and strengthening bonds here in Sicily.

Prior to the disaster, I would classify our COMREL program as merely adequate. While I didn’t find it to be the most exciting aspect of the base PAO job, we did run the occasional base tour, hosted parties for orphans and threw the gates open for the locals every summer for an annual Fourth of July blowout.

Following the Cavalese incident, we sat down, re-evaluated our programs and saw the need to turn up the heat. After going back to the drawing board, we created a new battle plan.

The difficulty with COMREL in general is that it’s a vague term and success is difficult to measure. To attempt to counter this, we articulated a goal — bolster the image of deployed American service members and their families.

We surmised that by engaging in comprehensive and proactive COMREL, we would attempt to dispel speculations and suspicion of U.S. activities behind the gates of Naval Air Station Sigonella (NASSIG). Involvement with all facets of the general population would promote a better understanding of the U.S. military, its members and our reason for having a presence in their community.

To do this, we targeted four principal audiences to provide a variety of ages and social classes — a wide cross-section of Sicilian society — to promote a better
understanding of U.S. presence in Italy. The following groups have been the focus of the effort since the program kicked off in March 1998:

1) Business and Civic Leaders: Base tours were offered and given to business organizations such as the Lion’s Club and Rotary Clubs of several cities to educate business leaders on the role of the U.S. military in Europe. Targeting business and social leaders ensures positive reaction to U.S. involvement in Sicily is filtered to upper income groups.

2) Municipalities: Social functions and joint training were coordinated with municipalities such as local law enforcement, disaster preparation teams and fire fighters to provide for better cooperation when the need arises.

3) Schools: School and base visit programs expose students to Sailors and American school children with the goal of creating a long-standing relationship of understanding and teamwork between Italy and the United States early on.

4) Religious organizations: With Italy being more than 95 percent Catholic, interacting with local religious leaders and sponsoring more than 20 local orphanages enabled NASSIG representatives to demonstrate we are good neighbours.

Between educating the local populace about the mission of the base and promoting cooperation, we hoped to show the U.S. military presence abroad in a positive light to reduce misperceptions.

The final part of the plan was to strengthen relations with small Sicilian media outlets. We hosted a few media days and worked closely with Commander, Naval Air Forces Mediterranean (COMFAIRMED), AFSOUTH [now JFC Naples] and the U.S. Embassy in Rome to generate a large media embark of the small Sicilian press agencies (TV, radio and print) that visited Sigonella for a NATO Maritime Patrol Exercise in late February 1999.

The timing of that visit was pure luck as NATO air strikes in the former Yugoslavia began a week later. Establishing a relationship with the smaller markets as well as maintaining a good one with the larger markets paid dividends as 80 percent of the reporters who were part of the embark returned for official comment on the campaign. The stories that saw print were not only glowingly positive, but they seemed to actually cheer NATO on. The lesson we learned here was, “don’t forget the small press”.

We were able to measure our overall progress of strengthening relations two weeks later when we received word that a protest against NATO aggression in Yugoslavia would occur outside our gates the following day. We braced for an ugly crowd but only about 60 protesters actually showed up. We later learned 40 had been bussed in from Naples. Interesting, considering that our neighbouring city of Catania has a population of more than 380,000.

A strong COMREL plan is worth its weight in gold, and although essential, it doesn’t need to be overly complicated. Simple face-to-face contact between our Sailors and
a wide range of people can establish a trust that will support us in accomplishing our mission as well as help us weather the occasional storm.

*Lieutenant, now Navy Captain (ret.), Surette was the public affairs officer at NAS Sigonella, Italy, at the time of the incident. This case study is reprinted with his permission.*
Annex 6-B Sample Outline for a Community-Survey File

The Area

- Geographical description:
  - Size of area.
  - Population and demographics.
  - Climate, topography, annual and seasonal temperatures, rainfall, etc.
- Historical data.
- Economic data:
  - Types of industry.
  - Unemployment rate.
  - Cost-of-living index.
  - Direct benefits of base.

Recreation and Entertainment

- Cultural attractions.
- Commercial facilities.
- Parks.
- Spectator sports.
- Amateur sports.

Civic Government

- Key personnel in local and regional governments.
- Offices of federal and provincial elected officials.

Organisations

- Civic.
- Fraternal.
- Women’s groups.
- Youth groups.
- Business groups.
- Labour groups.
- Veterans’ groups.
- Interest groups.

Housing

- Housing units available.
- Housing regulations and zoning laws.
- Cost and adequacy.
Other Community Facilities and Services

- Utilities.
- Transportation:
  - Highways.
  - Buses.
  - Taxi services.
  - Rail.
  - Air.
- Education:
  - Public.
  - Private.
  - Higher.
- Health care.
- Fire protection.
- Police protection.
- Churches.
- Sanitation services.
- Hotels and motels.
- Convention centres.

Communications Media

- Newspapers, magazines, and newsletters:
  - Writers and contacts on military issues.
  - SMEs/talkings heads/third-party validators.
  - Key personnel.
  - Deadlines.
  - Policy considerations.
  - Wire services.
  - Type of ownership.
- Broadcast media:
  - Radio:
    - Type of format.
    - Key personnel.
    - Deadlines.
  - Television:
    - Network affiliation.
    - Key personnel.
    - Deadlines.
    - Policy considerations.
    - Tape format.

Public Relations and Lobbyists

- Contacts and services, listed by company community leaders.
- List those in the community, and the types of issues they influence.
Annex 6-C  Special Events, Exhibitions and Displays

1. Introduction. Special events can be used as strategic PA activities in support of a larger PA strategy or campaign, part of a COMREL program (particularly if they are done in conjunction with the host community), or they can be stand-alone events. They can include exhibits and displays, imagery, print material, and giveaways.

2. Planning Considerations for Special Events. Special events may consist of equipment displays, parades, VIP visits, etc., hosted by a formation, a base, or even an individual unit. These events may involve many hundreds of military personnel, a few dozen or even just a few individuals. Special events may serve a PA function that focuses on an external audience, or they may be conducted primarily to entertain or to educate an internal audience. Audiences could range from the local community to high-ranking officers within NATO.

   a. In terms of complexity, special events may range from a single unit ‘open house’ to one involving an entire formation with equipment displays from units garrisoned in different locations, or even a visit to an ACO or ACT establishment by a small group of high-ranking military or civilian VIPs from a member nation. VIP visits may be high or low profile and in all cases, the PAO must know what the chain of command’s expectations are with respect to PA support.

   b. Regardless of their size, complexity and purpose, special events, like any other military activity, must be carefully planned. Special events require a significant amount of logistics support (e.g. parking, security, food, medical assistance) that must be coordinated with other staff – not just staff PAOs. Bear in mind that special events almost always involve host nation or visiting VIPs, and they require a significant amount of coordination and attention to a broad range of details. Consult Protocol for advice.

   c. It is important to note that, although special events may have a PA purpose, a PAO should not be the overall coordinator of such an event. Special event planning is usually quite complex and will involve much time as well as significant staff and equipment resources. PAOs should be careful about what they volunteer for and if necessary, consult the PA TechNet before agreeing to something because their actions may have an impact on ACO/ACT PAOs in other locations. The PAO’s involvement should be limited to the PA aspects of the event, not the overall execution of the event. The PAO will be far more effective developing and implementing a PA plan to support the event and then marketing the event.

   d. Special events can incorporate such things as a Change of Command ceremony, an event featuring the arrival of a new ship to a fleet or an air show featuring a nation’s air demonstration team. Change of Command parades should have PA and imagery support and should be closely coordinated with the staff organising the parade itself. The commander is the face of the organisation in the local community, and building his/her profile can help with your COMREL program. Set up an exhibit and invite the local community.
e. Often, NATO operations are held in countries far away from the Troop Contributing Nations. Special events, exhibits and displays are often the only real mechanisms (outside of media coverage) that serve to inform the public of the personnel and equipment resources that NATO has at its disposal to support NATO mandated operations.

f. Many NATO member nations hold special events, open houses or military equipment displays and capability demonstrations at their bases, wings and unit levels. These activities are often an important component of community relations programmes, and also fall into the category of special events, exhibits or displays and give members of the public an opportunity to acquaint themselves with the myriad tasks NATO nations perform each day.

g. Special events invariably involve media operations and media coverage. A supporting media plan must be included in the overall PA plan for the event and must include media requirements, before, during and after the event.

h. In addition to a visual display or show, special events usually also include other more static exhibit components such as exhibits or displays.

3. **Exhibits and displays** are a highly effective mechanism to attract public attention and interest in order to deliver selected messages using a low-tech format.

a. Exhibits and displays are organised at all levels within NATO and, in most instances, they are intended for the general public. Exhibits and displays can support a special event or may be a stand-alone attraction. Many NATO nations already use exhibits and displays in support of nations recruiting activities but they are also an integral part of ACO’s PA activities at the operational and tactical level.

b. ACO/ACT headquarters co-ordinates exhibitions and displays that are primarily targeted at the strategic level. These exhibits and displays are designed to target the public and generate or enhance specific NATO PA objectives at the strategic level. Previous examples include displays at the NATO summits and various ministerial level meetings.

c. When planning an exhibit, consider its purpose and ask some basic PA planning questions before you begin:

- Who is your audience?
- What is your message?
- How are you going to tell them?
- When are you going to tell them?
- Are there security, privacy or other limiting factors?

d. It is a good idea to plan for and develop promotional material that you know will be effective for the audience you are trying to target to enhance your
ability to deliver your key messages. Supporting material can include posters, information brochures, and give-‘away’ promotional items such as lapel pins, pens, etc. On the more elaborate side, DVDs/videos can be produced which inform your audiences of your specific unit activities. Be aware that these are more costly and require much more planning time but can be very effective products.

e. While JFC/CC exhibits displays do not need to be elaborate or expensive there is almost always some cost associated with these capabilities. More importantly, the exhibit equipment elements require time to develop, design, and produce. Some of the very best features of an effective exhibit are the very equipment that nations’ soldier, sailors and air force personnel use. Even serving up military rations to the general public goes a long way to educating the public (or even guest military visitors) about NATO nation’s missions and roles. Visitors will want to touch the items on display, climb into and to clearly understand their uses and capabilities. Displays can consist of nothing more than a piece of equipment, a weapon, a vehicle, or an aircraft.

4. **Exhibit Staff.** It is absolutely critical to have knowledgeable staff (both military and civilian) working at your exhibits and displays. These personnel are the public face of ACO and ACT, so they should be personnel who enjoy their work and are capable of passing along information in plain, simple terms. The staff needs to be able to effectively engage the public. The staff needs to be provided with the appropriate and most current NATO messages and, where possible, formal training to exhibit staff personnel would be ideal.

   a. PAOs should never be the automatic default exhibit staff. The public and the media want to talk to operators; military personnel who have been on operations and who can explain how to use any military equipment that is on display. If an exhibit is part of a larger special event with media in attendance, the PAO will be far too busy with the media to be able to staff the exhibit.

   b. All ACO and ACT exhibit and display material (display walls, promotional material to accompany the exhibit) shall conform to the NATO Visual Identity Guidelines.

5. **Professional Exhibit Design and Production.** Many commercial companies offer services to assist you in the development, design and production of exhibit components – exhibit walls, racks to display information brochures, even light shows that are very effective in attracting visitors to the exhibit. To contract these types of commercial services, proper NATO contracting rules and regulations must be followed.

6. **Budget.** As mentioned, special events, exhibits and displays do not have to cost a lot of money, but taking the time to plan out a budget will go a long way to ensuring adequate financial resources are available when it comes time to execute the PA plan with the special event, exhibit or display.
Annex 6-D Special-Events Checklist / Aide-Memoire

Regardless of the type of event you select to showcase, there are certain fundamentals which apply to staging or coordinating all special events. PAOs must consider certain basics to ensure the event succeeds.

Although there is a great deal of difference between an air show and a Change-of-Command parade, both events are similar from a planning point of view.

The following checklist includes some of the major factors which PAOs responsible for organising or coordinating special events must consider. Note that the non-PA tasks must be assigned to someone in the Command Group/organising committee:

The Event Objective or Aim:

- Identify the objective or aim for holding your special event.
  - Is it purely for public relations?
  - Is it to inform, educate, or entertain?
- Identify the audience to whom you are communicating.
  - Is your audience military community, local opinion leaders, or the general public?
- How often do you want to hold this type of event?
  - Is it an annual event? Or is it a one-time-only activity?

Co-ordination:

- Obtain from the commander a clear statement of responsibilities for event-related activities. In most situations, PAOs do not have tasking authority and will require the support of the Headquarters Support Group or J-3.
- Prepare a schedule of critical deadlines and activities leading up to the event.
- Arrange for imagery support.
- Plan progress review meetings for agencies to report status and problems.
- Keep the commander informed of progress.

Location:

- Select an appropriate, accessible location or locations.
- Select an alternate location in case of inclement weather.
- Make sure the required facilities, such as power, water, and washrooms, are available at the chosen locations.
Promotion:

- Provide internal audiences with event information through such media as base newspapers, routine orders, flyers, and posters.
- Provide external audiences with information through the local media by using news releases, public service announcements, and appearances on local radio and television programs.
- Invite local media representatives to preview the event 24 hours before it takes place or, in the case of parades, to attend dress rehearsals.
- Designate spokespersons and media contacts.

Communications:

- Find out whether you will need a public address system.
- Arrange for mobile phones or hand-held radios for staff to communicate.
- Make arrangements for media needs, such as remote or live-broadcast.

Administration and Logistics:

- Issue VIP invitations in coordination with Protocol (if applicable).
- Prepare print material early to allow time for translation, film work, or printing.
- Establish parking areas and arrange pass system (if necessary).
- Arrange for VIP and media areas in coordination with Protocol.

Special Arrangements:

- Prepare accident/incident contingency plans.
- Arrange for emergency medical facilities.

Follow-Up:

- Prepare a thorough and objective after-action report.
- Establish solid recommendations on how to improve future special events.
Annex 6-E  Example Operations Order for an Installation Open House

TO: SEE DISTRIBUTION

SUBJECT: OPORD – Heritage Days/Journees Du Patrimoine, 8-9 Sep 2013 and Fun Fest Bus Tour 1 Sep.

1. SITUATION: The Belgian “Journées du Patrimoine – Heritage Days” will take place in the Walloon Region of Belgium on 8 and 9 Sep 2013. The theme of the Heritage Days this year is military architectural heritage. SHAPE has agreed to open its doors on these two days, between 13:00-17:00 hours. Visitors from all over Belgium may take advantage of this unique opportunity to visit SHAPE HQ. In addition, the Fun Fest, 1 Sep, will be used to allow families to visit SHAPE as a tour rehearsal for the Heritage Days. An additional day of tours for VIPs and media will be held 7 Sep.

2. MISSION: SHAPE will conduct a series of “Open House” tours as a function of the “Journées du Patrimoine – Heritage Days” consisting of a bus tour and a visit of the SHAPE Command Centre. Total time of the proposed tour: 90 minutes.

3. EXECUTION:

a. Concept of Operations:

1). SHAPE personnel will conduct visitor tours on the following four days:

   a). Morning 1 Sep (11:30) as a dry run for the guides (1 bus);
   b). Afternoon 1 Sep (13:00) for families at Fun Fest (5 or 6 buses);
   c). VIP and media visits 7 Sep (1 bus) will be an additional rehearsal at 10:00 for the media and 13:30 for the VIP’s.
   d). Heritage Days 8 and 9 Sep (5 or 6 buses).

2). Visits during the Fun Fest will begin and end by the Carrefour parking lot.

3). Heritage Days visitors: All visitors will be directed to the Visitors’ Centre in the SHAPE Events Centre. It will contain a visitors’ control desk in the entrance of the building, a concession stand for snacks/ drinks and souvenir sales in the doom room, with a small area for the SHAPE Band and two PUA information-briefing rooms. Visitors will leave their cars in the designated car park(s) (cordoned off) next to the SHAPE Events Centre and if overload to the library parking lot. They will be directed to the Welcome Desk in the Visitors’ Centre.

4). Two SHAPE buses will leave every half hour. There will be a guide for each bus and a sufficient ability to cater to French, Dutch and English. The SHAPE Command Centre (Bunker) visit is planned at the end of the circuit and will last approx. 30 minutes. Mr. (NAME, phone) is the POC for this part of the visit. He will ensure the bunker is properly prepared and staffed for the visit.
5). Rehearsals will start 1 Sep at 11:30 (SHAPE Fun Fest). The Media/VIP Day will be an additional rehearsal and is scheduled for 7 Sep. See schedule for rehearsals under Para C, Coordinating Instructions.

6). Specific itineraries and tour scripts will be published prior to the event.

b. Responsibilities:

1). DOM and SO NMR Echelon are requested to task divisions/NMRs to provide escorts/guides and support personnel as per the attached excel sheet.

2). Commander NCIA Sector Mons is requested to provide:

   a). Sound support for the Visitors’ Centre (SHAPE Events Centre). The sound systems and the public announcement system must be in place and tested before the VIP/Media Day on 7 Sep. A sufficient number of speakers should be available to permit all attendees to hear the announcements in all the rooms that are to be used; and

   b). Sound support personnel 7, 8 & 9 Sep, 30 minutes before the event.

3). PUA has overall responsibility for all events, and will:

   a). Provide public information/media relations;
   b). Provide coordinating staff throughout the weekend and rehearsals;
   c). Produce information leaflets for handing out to visitors;
   d). Provide articles to SHAPE Community Life before and after the event;
   e). Provide photographic support;
   f). Coordinate artwork for all required signage.

4). BSG is to:

   a). Provide and set up a tent with a table and 2 chairs for the Fun Fest visit.
   b). Block use of SHAPE Events Centre for 7-8-9 Sep;
   c). Publish appropriate articles in the SHAPE Community Life prior to and after the Heritage Days. Co-ordinate with PUA;
   d). Prepare SHAPE Events Centre for Media/VIP Day and Heritage Days NLT 10:00, 7 Sep;
   e). Provide small musical ensembles of the SHAPE band during visiting hours
   f). Ensure snack food, coffee and other appropriate beverages are available for sale, as well as tables and chairs;
   g). Provide souvenir items for sale (arts and crafts); and
   h). Produce signage as required.

5). BSG PWL is to:
a). Ensure the lobby and exterior areas of the SHAPE Events Centre are thoroughly cleaned prior to the Heritage Days;
b). Ensure that a member of PWL reports to the BSG Project Officer on 7 Sep to inspect the area;
c). Provide and arrange NATO and PfP flags and stands in co-ordination with BSG Action Officer;
d). Schedule latrine cleaning personnel and extra toilet paper;
e). Ensure the fire station is aware of the visit and ready to intervene. If desired, the Fire Service may wish to place one of their trucks in the parking lot by the SHAPE Events Centre as an attraction and fire safety awareness demo for visitors as they wait for their tours.

6). BSG BSM will provide:

a). one bus for 11:30 dry run on 1 Sep for rehearsal on Fun Fest day;
b). four buses from 13:00 to 16:30 on 1 Sep;
c). one bus on 7 Sep for Media Day at 09:50, and for VIP’s at 13:20,
d). up to 6 buses between 1230 and 1830 hours on 8 & 9 Sep;
e). one mini-van on standby on 8 & 9 Sep for any emergency local trips outside of the SHAPE Events Centre;

7). BSG Provost Marshal’s Office is to:

a). Issue separate police OPORD, delineating necessary traffic control, a car-parking plan, security at entrance of the Visitors’ Centre and Bunker;
b). Co-ordinate with the SHAPE Federal Police (SFP) on the impact on traffic safety on Rue Grande/Chaussee de Bruxelles caused by increased traffic arriving for the Heritage Days;
c). Co-ordinate with PUA and BSG as to proper control of visitors;
d). Seal off SHAPE Events Centre car park for the Heritage Days.
e). Manage visitor parking on both days;
f). Close roads as appropriate or required to avoid having visitors wandering in the SHAPE compound, while not interfering with Shapians’ movement;
g). Co-ordinate security sweeps of SHAPE Events Centre as required.

8). BSG HNLO is responsible for coordinating with the host nation in order to provide an ambulance for emergency medical coverage during the event.

9). SHAPE Protocol will coordinate all aspects of the VIP visit on 7 Sep.

c. Co-ordinating Instructions:

1). The last coordination meeting will take place in the PUA briefing room (Bldg 102 room 248) on 31 Aug at 13:30.
2). Dress for both rehearsals (1 and 7 Sep) and Heritage days: National Service Dress (preferable combat clothing).

3). Rehearsal Schedule:

a). A dry- run will be held at 11:30 on 1 Sep for all guides and the two buses to be used that day. Between 13:00 hours and 16:30 hours, the visit will be run using four buses. A bus tour for SHAPE families will be organised along the same lines as planned for the Heritage Days.

b). There will be an additional rehearsal on 7 Sep when local media and local VIPs will be invited. Timings are for media at 10:00, and for VIP’s at 13:30.

d. The PUA Coordinator is (RANK, NAME), ext. 1234; the SG Project Officer is (RANK, NAME), ext. 5678.

FOR THE DOM

(NAME, RANK)

DISTRIBUTION:

COS
DCOS Operations
DCOS Resources
DOM
Commander, NCIA Sect Mons
SO NMR Echelon
Commander, SHAPE Healthcare Facility

Internal –
Action:
Chief, Public Affairs Office
SHAPE Protocol
BSG Commander
HNLO
PMO
BSG BSM
BSG PWL
BSG SES
MWR
BSG EXO
BSG Admin Supervisor
BSG SCC
Bandmaster, SHAPE International Band
Annex 6-F  Base Tour Checklist

**Briefers and Speakers**
- Have they been requested and confirmed?
- Have they been given background information on the group?
- Who will introduce them?
- Will they be invited to eat with the group? Who will pay?
- Have they been informed what uniform to wear?
- Is background information on the speakers required?
- Have briefings, presentations, and speeches been tailored to the group?
- Who will prepare them?
- Will copies be distributed?
- Do speeches have to be cleared with higher headquarters?
- Have briefing rooms been scheduled?
- Is audio-visual support arranged (equipment, spare bulbs, operators)?
- Do speakers desire a podium, microphone, or other public address system?
- Has water been organized?
- Will the speakers be tape recorded or videotaped? Have they been notified?
- Is a dry run required for any presentation?
- Should seats be reserved for speakers waiting their turns to speak, staying to hear other speakers, or requiring staff members to listen?
- Will questions be allowed?
- Are speakers prepared to answer questions likely to come from the particular group (i.e., noise complaints, base construction, and civilian employment)?
- Is there a plan for keeping speakers within their scheduled times if the itinerary is rigid? Do the speakers know?

**Escorts**
- How many will be required? Are backup escorts necessary?
- Have they been briefed on their responsibilities?
- Have they been given background information on the group?
- Have meals and, other accommodations, been arranged for escorts? Who will pay?
- Have they been told what uniform to wear?
- Do they know locations of all tour stops and activities? Can they answer questions about other arrangements made for the group?
- Do they know locations of restrooms, water fountains, off-base capable telephones, etc., along the tour route?
- Is a dry run required?
- Where will the escorts assemble?
- Do they have appropriate names and phone numbers to contact if problems or delays occur?
Itinerary and Agenda
☐ Is there a backup plan for events that are tentative or might be affected by adverse weather?
☐ Has appropriate participation by the commander been coordinated?
☐ Are other activities or exercises scheduled for the same dates? Will the activity serve as a detriment to desired tour support or could the tour be enhanced by including the activity in the itinerary?
☐ Have all restricted areas been identified and provided for?
☐ Will guests be allowed to bring personal cameras? What safekeeping measures will be taken if they cannot take cameras into certain areas?
☐ Are restroom breaks included?
☐ Will all affected areas be clean and spruced up for the visit?
☐ Will group make any presentations to base officials? Will base officials make any presentations to the group? Have recipients been advised?
☐ Is a base photographer required?
☐ Can refreshments be provided?
☐ Are telephone facilities available?
☐ Is there an appropriate mix of standing, sitting, and walking stops on the tour, for the comfort of the group?
☐ Do all supporting personnel have a copy of the itinerary?
☐ Will one person be available in the PA Office to coordinate last-minute changes?

Arrival
☐ Will escorts be early in case the group is early?
☐ Have security forces been briefed on arrival time and location?
☐ Have information packets been prepared (agenda, fact sheets and biographies)? Will they be distributed upon arrival or placed in rooms?

Media
☐ Is there local media interest?
☐ Should the tour be covered by base newspaper representative?
☐ Have ground rules been discussed with them? Has the commander and others who might be affected been advised?

Follow-Up
☐ Are letters of appreciation appropriate?
☐ Will photos be sent to group?
☐ Are after-action reports required?
☐ Is there a way to get feedback from the group for use in fine-tuning future tours?
Chapter 7

Public Affairs Training

“The value of an education ... is not learning of many facts but the training of the mind to think something that cannot be learned from textbooks.”

– Albert Einstein

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7.1. Introduction.

a. As with all military activities, to be confident, proficient and effective, PAOs, PA staff members and spokespersons require training at various levels and across a wide spectrum of topics. Unfortunately, in the heat of conducting real-world PA operations, training often becomes a secondary priority forcing the PA staff to learn by ‘on the job training’. Obviously, being expected to perform at a high state of effectiveness in this manner is not the optimal solution. But with the limited time available, high real-world operational tempo, differing skill levels, skill sets and languages of an ACO/ACT PAO staff, how can the PAO meld his team into an efficient organisation? This chapter will provide a primer for the PAO to develop training concepts for his particular situation.

b. This chapter briefly introduces:

- ideas, recommendations and techniques for the PAO to formulate a collective training programme for his PA section. These ideas will help maximize those individual skills taught through national and
ACT programmes to apply them to a collective team environment in preparation for real world missions (including unforecasted ones);

- ideas to prepare spokespersons, non-PA service members and family members for media engagements;
- assessment tools for the PAO to tailor to his own training needs.

7.2. Developing a Training Plan.

a. Analysis. Developing a training plan begins with an analysis of the mission, commander’s guidance and HHQs specified and implied tasks. This analysis should not be limited to the purely PAO tasks but should also take into consideration the mission and tasks for the unit that the PAO section supports.

b. Critical Task Development. From this analysis, the PAO then determines four or five critical tasks required for accomplishing that mission and fulfilling the stated guidance. These critical tasks will normally be larger scale collective (team) tasks as opposed to individual service member tasks. For example, a PAO preparing to deploy his PAO section might assess his critical tasks to be:

| Critical Task 1. | Establish and run a NMOC |
| Critical Task 2. | Coordinate information strategies with (CIS Directorate / Joint Effect Management Board / StratCom) |
| Critical Task 3. | Prepare the commander/spokesperson/SME for media interviews |
| Critical Task 4. | Develop and execute an imagery strategy |

Once establishing these as his critical tasks, they become the cornerstone for allocating time and resources towards developing his section’s proficiency.

c. Sub-task Development. After critical tasks are chosen, sub-tasks can be developed. The subtasks begin to identify lower-level collective and individual tasks which are required to be proficient at the critical task. In other words, the subtasks are the ‘bite-sized chunks’ that can be trained daily. The multiple sub-tasks should complement each other, building the various skill sets of the section towards accomplishing the critical tasks.

Taking our example forward, the PAO may decide to focus on the imagery requirements of his mission. He would develop the sub-tasks which support the critical task as follows:

| Sub-task a. | Develop photography skills |
| Sub-task b. | Develop video skills |
| Sub-task c. | Determine imagery needs |
| Sub-task d. | Identify imagery opportunities |
| Sub-task e. | Format imagery for internet release |
| Sub-task f. | Assess imagery for OPSEC or policy compliance |
| Sub-task g. | Archive and retrieve imagery |
| Sub-task h. | Deploy and operate DVIDS / BGAN24 |

24 Broadband Global Area Network (Internet satellite system with telephony using portable terminals).
d. Training Management. The PAO, operating in a time-constrained environment must first prioritise his training focus and resources. Some recommendations, based on our imagery critical task example, follow:

(1) Assess existing skills. Assess what the section is already good at and what skills they truly need to develop. For instance, if the imagery section is proficient in photography composition and editing, perhaps the training should jump to policy or logistics. The PAO has to make this decision based on his assessment of current proficiency.

(2) Prioritise. Decide what the key, most important skills are and focus training on those skills. For example, if your photographers lack sufficient camera function and composition skills, this should be the first priority for training. All of the DVIDS work, logistics planning and archiving will not matter if the photographic skill sets are lacking.

(3) Focus on sub-tasks initially. Once a base proficiency level has been reached with sub-tasks, the critical tasks begin to take shape. A foundation of multiple sub-tasks will cascade toward proficiency at critical tasks.

(4) Utilize NCO’s talents. NCOs are the technical experts. Use their skills and experience to your advantage.

(5) Co-opt. Seek other agencies or assets requiring or providing the required training. For instance, local newspaper photographers might be willing to establish a training partnership in return for embed opportunities.

(6) Protect training time. In real-world PA it is very easy to get caught in daily operations, overlooking training time. Daily staff requirements will invariably encroach on training. In this case, the PAO must make clear that training is a priority and must protect the PAO section from outside interference. This might require standing up to the chain of command, but it is vital to ensure that the section is prepared to accomplish its mission.

e. Battle Drills. In real world operations, certain tasks must happen automatically. The team must recognise the trigger of the event, and then begin to accomplish specified tasks in accordance with standing operating procedures. When an incident occurs, the unit must know, almost instinctively, how to react as a team. In combat arms branches these are called ‘battle drills’. Smooth execution of battle drills is a result of repetitive training and rehearsal of that task. When applied to PA, this could mean reacting to a casualty situation. The trigger in this case might be the notification by the PA liaison in the operations centre to the Media Operations section of the casualty report. The Media Operations section would then work through the liaison and J-3 to gather facts on the incident, draft a press release, coordinate with higher headquarters, and review the
release for factual correctness and policy compliance. The final tasks would involve gaining approval from the CPAO and Command Group and completing the drill by releasing the press release within a specified number of minutes. Other battle drills might include: identifying and releasing weapons sight video to rebut enemy propaganda statements; preparing commanders and SMEs for impromptu, opportunity media engagements; or setting up the DVIDS satellite equipment.

Do not limit training battle drills to purely PA functions. PA should strive to integrate into operational battle drills as well. Examples for this include PA photographers and PA staff establishing an immediate NMOC and documentation of an incident site.

f. Performance Measures. Once the training tasks and objectives are identified, the PAO must identify how he will evaluate the training – typically this is done by comparing the training against performance standards. Performance standards form the basis of the lesson plans and evaluation. They should identify the specific skills and tasks required to perform a sub task well. This handbook provides policy recommendations, templates and examples of PA products that the PAO may use to develop performance standards. Continuing with our imagery example, the PAO can use Chapter 9 – Imagery to evaluate a photographer’s captioning skills. In addition to the handbook, many national PA schools maintain very specific performance standards for a variety of tasks.

g. Training Appraisal and Feedback. A critical part of training is providing good, honest and critical feedback in a positive manner for growth and improvement. There is a variety of ways to provide feedback, most of which are beyond the scope of this text. It is important, however feedback is done, to ensure that the subordinate knows the standard and understands whether his performance met the standard or where and how it did not meet the standard.

h. Training Cycle. Training is an on-going process. The training process is never complete. The PAO must continually re-assess the competence level of his staff, modifying and tailoring the training plan, particularly during times of personnel transition, changes of mission or changes in equipment. Likewise, as a general proficiency is developed across the spectrum of tasks, the PAO should seek to increase proficiency to a higher standard.

i. Include Regional and Cultural Training. For PA to deploy and operate in a foreign environment, the PA staff must maintain a decent perspective on the host nation’s language, infrastructure, and cultural nuisances. Such aspects should also be included in the PA training plan. A resourceful PAO might bring in SMEs to talk about the culture and media environment, arrange language training and to develop a reading and viewing list of appropriate books, films and documentaries to culturally sensitise the section.

j. Basic Soldier Skills. Do not overlook the basic soldier and military skills required to survive in a hostile environment. This is important for two reasons: first and foremost, your PA service members must be able to
operate within a military formation, defending themselves when necessary; secondly, they must always be seen as service members first and PA practitioners second to maintain the credibility of the career field.

7.3. **Non-PA Service Member Training.** PA training should not be limited to training PA soldiers. PAOs also have a responsibility to train commanders, spokespersons, non-PA service members and family members in military/media relations. Organic PA elements must develop training programmes for their supported units. These can take the form of classes as well as pre-deployment briefings for units and family members.

a. Training for commanders and SMEs. Unit commanders and individual SMEs must be prepared to be interviewed. It is a PA responsibility to ensure they are familiar with the ground rules and understand to restrict statements and comments to their respective area of expertise. Preparation recommendations, interview techniques and assessment resources are provided as Annex 7-A, B, C, and D.

Commanders must also be trained on national and Alliance PA policies and potential issues which they might face regarding command philosophy, service members’ relations with the media, and social media policies, for example. The PAO, working with other key staff functions, must inform, advise and train the commander so he may make reasonable decisions in these matters.

b. Training non-PA Service Members. Individual service members must be advised of the inevitability of media presence during operations. Units PA training should be part of NCO training time and consist of training the respective nation’s media policies what they should and should not talk about when meeting the press. ACO encourages service members to address the media in a professional, informed manner, provided the service member’s remarks fall within his lane of responsibility and within his respective nation’s media policy.

c. Training UPARs. As stated in Chapter 2, Role of the PAO, PA responsibilities might have to be delegated to a non-PA trained representative. PAOs should advise the commander on selecting a competent, well-spoken and operationally informed UPAR to support his communications objectives. Once selected, it is the PAO’s responsibility to train the UPAR and prove him the tools and support to succeed. Annexes 7-G, H, and I provide examples of SOPs, checklist and training plans which can be tailored to fit the command’s needs.

d. Training for Family Members. PA training for family members consists of educating them on their rights and responsibilities when interacting with the media. Family members often know more about specific operations than should be revealed to the media. They must be advised not to discuss information, which may be used by the enemy against their spouse’s unit, such as details about troop movements, destinations, missions, etc. They must also be advised that they have the right to refuse to talk to the media. Family member briefings should be a standard element of pre-deployment activities. A sample training outline is provided as Annex 7-J.
7.4. **PAO Professional Development.** PAO professional development is often neglected due to time constraints and high operational tempo. The PAO should make efforts to seek out training and professional development opportunities. Professional forums, recommended reading lists, PA TechNet collaboration and active pursuit of mentorship are all means to satisfy the need for professional development and growth. Additionally, ACT and several Alliance nations open enrolment of senior PA courses to Alliance PAOs. There are great opportunities to, not only learn the PA craft, but also to develop multi-national contacts and insight.

7.5. **Indigenous/Partner Forces Training.** Contemporary operations show that Alliance PAOs will be called upon to train, mentor and assist indigenous and partner forces with developing and increasing their PA and communications capabilities. The recommendations and examples within this handbook proved a good starting place to begin developing training programmes. Higher headquarters, Ministries of Foreign Affairs and Embassies might also be a good source of information, material and guidance when pursuing partner force training.

7.6. **Training Products.** The following annexes are provided as examples to develop training resources for your unit’s PA training. These are generic in nature and do not necessarily comply with each nation’s PA of media policies. They should be tailored to your particular national policy, mission and commander’s intent.
Annex 7-A  Prepare a Spokesperson to Address the Media

Part of the PA mission is to provide media interaction training. Successful training ensures a spokesperson is prepared to address the media in a positive, correct and effective manner and can respond to questions while stating the command’s position, knowing and understanding PA policy and release guidelines. When preparing a spokesperson, PA staff should:

- Determine if the spokesperson will address the media in a one-on-one interview dealing with one subject or in an open forum where reporters can ask about anything. Develop a draft script and prepare answers to anticipated questions for the briefer.
- If the topic of the interview involves an extremely complicated or highly technical subject, call on a SME to help you put the information into understandable terms. In most cases it is better to have the SME as the briefer. If that is not possible, ensure he is at the briefing and at the training session.
- Try to find out who the reporters are and how they handled previous military briefings.
- Establish enforceable procedures/ground rules on what will be covered and how much time will be allowed for questions.
- Determine uniform and protocol requirements.
- Prepare a draft script to familiarise the briefer with the format of a media briefing and the kinds of questions he will be asked based on the presentation and the current situation.
- Setup: Provide all the materials and equipment at the briefing site. Provide handouts/fact sheets to the media prior to delivering the opening statement.
- Visual aids: prepare handouts/fact sheets for the briefing. Add cues to the briefing text for visual aids. Ensure you have the proper equipment (video playback, projectors, chalkboards, flip charts, maps, etc.).

Develop Opening Statement (gives the ‘5 W’s’ and command messages).

- Introduction (greeting, purpose and procedures).
- Presentation of facts (summary lead, body).
- Conclusion (reinforce theme or message).
- Emphasise competence and caring in the event of tragedy.

Develop Questions and Answers.

- Anticipate likely questions:
  - 5 “Good“ questions – what you want the public to know.
  - 5’Tough‘ questions” – problem areas, issues for which you don’t have answers.
• Prepare answers to anticipated questions not already covered in the opening statement of your script. Question the position. How will people understand the position?
• Submit answers for review by an approval authority (SME, higher HQ, etc.).
• Know the key points to be made and highlight them on the spokesperson’s notes/script.

Preparing a Command Spokesperson / SME Checklist.

1. **PRE-INTERVIEW.**
   a. **Spokesman / SME:**
      - Explain PAO role in process.
      - Background on reporter, news organisation.
      - Obtain and review PAG.
      - Review command messages, talking points.
      - What image/themes do you want and NOT want to portray...what do you want the audience to take away from the interview?
      - Develop sound bite synopsis.
      - Who is the target audience for your message?
      - Attribution rules.
      - Ground rules.
      - Policy restrictions.
      - Time limit.
      - Physical setting of the interview.
      - SME appearance.
      - SME concerns (nervous, distrust media, etc.).
      - Give information on stance and style of reporter.
   b. **Reporter:**
      - Introduce self and explain role.
      - Inquire about special needs, requests.
      - Attribution category.
      - Ground rules.
      - Policy review.
      - Time limit.
      - Provide materials.
      - Begin command messages.
2. INTERVIEW.

- Introduce reporter and SME.
- Restate ground rules, security, accuracy, and property, time limit.
- Establish comfortable, professional climate.
- Get the interview started smoothly.
- Clarify any misunderstandings during interview.
- Repeat the question in your answer, plus add your message.
- Do not repeat negative words or phrases.
- Interrupt tactfully (gross violations policy or ground rules only).
- Take notes or record interview to develop interview skills of SME and to document the actual statements of the SME. This can be confused in translation or through political agendas.
- Watch body language of both SME and reporter. This will clue to angle of story and comfort levels.

3. POST INTERVIEW.

a. Reporter:

- Clarify any information needed by reporter.
- Clarify any misinformation given by SME.
- Confirm any of reporter's additional requirements.
- Confirm publication/broadcast DTG.
- Offer further assistance.
- Re-emphasise command's position.
- Identify who to contact – follow-up.

b. SME:

- Provide feedback on SME performance (good/bad).
- Forecast story/coverage based on interview.
- Provide publishing or broadcast time and date.

c. Provide higher command:

- Initial impressions report.
- Success in presenting command messages.
- Main theme of interview.
- Expected outcome.
Annex 7-B  Interview Techniques

1. **Blocking.**
   - Deftly avoiding the question.
   - Never say “No comment” or refuse to answer with hostility.
   - Block only when there is good reason for doing so.
   - Try to explain briefly why you cannot answer, usually OPSEC.
   - Bridge to your message.
   - Stay in your lane!
   - Only talk about things in your area of expertise and things of which you have direct knowledge.
   - “There’s a lot you can talk about without talking about what you can’t talk about!”

2. **Bridging** allows you to:
   - Turn the discussion to your agenda.
   - “Asked about a problem? Talk about a solution.”
   - Present your message and support it.

When bridging: block or answer the question briefly, then use a transitional phrase as a bridge to your message. Common bridging phrases are “what I can tell you”, “what you should consider”, “what’s important to realise”, etc.

Blocking and Bridging Sample:

**Q.** “Do you think NATO should attack Syria?”
**A:** “That’s a question for our nations’ leaders; what I will tell you is that soldiers at my base are trained and ready to perform any mission they are called on to do.”

3. **Interview ‘DO’S’.**

- Be polite but firm.
- Discuss how you would like to be addressed.
- Ask the reporters their names and try to break the ice.
- Use the reporter’s first name instead of ‘Sir’ or ‘Ma’am’.
- Respond to hard questions with ‘bad news’ as willingly as you do good news to establish credibility and a good relationship.
- Take your time: formulate the answer in your mind before speaking.
- Be brief & concise – 10-20 second responses are the rule of thumb.
- Try to avoid using large words, military words, jargon, and acronyms – the audience for your interview is the Alliance public.
Ignore the camera and talk to the interviewer.
Remain in control of the interview.
Reasoned responses will help you stay in control even if the questions are silly or aggressive.
Always think OPSEC.
Stay in YOUR LANE – only talk about matters within your responsibility or personal knowledge.
If you don’t know, say so.
Don’t make anything up or speculate.
If you can’t talk about something, tell the media why.
Be careful of statements of absolute nature.

4. Interview ‘DON’TS’.

- Participate in an interview that will interfere with your mission.
- Do not attempt to cover negative events with a cloak of security or secrecy.
- Refer requests for details about serious incidents to higher HQs.
- Don’t offer ‘off the record’ information.
- Never lie – you represent NATO and your unit.
- Do not discuss exact numbers or troop strength (use descriptions like ‘Light’, ‘Heavy’ or ‘Moderate’).
- Do not discuss political or foreign policy matters – you don’t speak for the politicians.
- Don’t give the enemy propaganda.
- Resist grumbling or thoughtlessly complaining.
- Don’t forget the enemy watches TV.
- Don’t get trapped.
- If a reporter claims they have information from a higher HQ, refer them back to that HQ for clarification.
- Don’t try to answer something OUTSIDE your lane!

5. Interview Presence (Physical Presentation).

Demonstrate Confidence

- Sound confident.
- Be conversational and informal.
- Vary your pace and be well-modulated.
- Exhibit confidence; don’t be nervous.
- Speak clear and strong.
- Look at the interviewer.
- Be open and relaxed.
☐ Be lively, but remember the emotion of the day.
☐ Be interesting.
☐ Be friendly.

Focus

☐ Control your eyes: Look at the reporter in one-on-one. Look at the person talking in a group. Look at the camera in a remote.
☐ Use appropriate nonverbal reactions and facial expressions.
☐ Listen carefully and attentively.
☐ Take off sunglasses and headgear.

Clarity

☐ Keep it simple but don’t talk down.
☐ Assume your audience knows little about the armed forces. Explain necessary points and make analogies.
☐ Avoid jargon, acronyms and bureaucratic/pretentious language.
☐ You’re not briefing your boss; you’re talking to the folks at home. Explain it like you would to ‘grandma’!
☐ No profanity!

Be mindful of your presentation

☐ Open – or closed off?
☐ Relaxed – or tense?
☐ Confident – or nervous?
☐ Lively – or stodgy?
☐ Interesting – or boring?
☐ Friendly – or hostile?
☐ Are you in the correct uniform (by national standards and by situation?)
# Annex 7-C NATO Military Spokesperson Training Debriefing Form

Date:                       Candidate: 

<table>
<thead>
<tr>
<th>NC</th>
<th>Radio</th>
<th>TV Studio</th>
<th>TV Stand up</th>
<th>DE</th>
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**Performance:**

**Non-verbal communication:**

<table>
<thead>
<tr>
<th>Confident</th>
<th>In control</th>
<th>Prepared</th>
<th>Body language</th>
<th>Posture</th>
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**Attitude:**

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<thead>
<tr>
<th>Respectful</th>
<th>Courteous</th>
<th>Focused</th>
<th>Not intimidated</th>
<th>Response to unexpected</th>
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**Delivery:**

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<thead>
<tr>
<th>Voice</th>
<th>Eye contact</th>
<th>Gestures</th>
<th>Facial expressions</th>
<th>Mannerisms / Tics</th>
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**Content:**

**Messaging:**

<table>
<thead>
<tr>
<th>Early mention</th>
<th>Clear</th>
<th>Complete</th>
<th>Repetition</th>
<th>Bridging</th>
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**Language:**

<table>
<thead>
<tr>
<th>Appropriate</th>
<th>Articulate</th>
<th>Sound bites</th>
<th>Jargon</th>
<th>Clear and concise</th>
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**Constraints:**

<table>
<thead>
<tr>
<th>Operational Security</th>
<th>Next of Kin Notification</th>
<th>Propriety</th>
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**Remarks:**

___________________________________  
Signature of Debriefer
Annex 7-D  A Leader’s Guide for Succeeding with the Media

1. Commanders, regardless of size or type of unit, have PA responsibilities. Commanders must ensure that they meet the information needs of the higher HQ and other critical national audiences and that the unit is prepared to operate in a media environment.

2. To operate successfully, commanders need to understand the following PA principles:
   a. Feed Internal Audiences. Identifying, understanding and fulfilling information of internal audiences enhances morale, confidence and unit discipline and effectiveness.
   b. Inform External Audiences. Facilitating the efforts of the media fosters the confidence of Alliance and other interested publics and deters enemies and potential adversaries by communicating capability, readiness and resolve.
   c. Every service person is a spokesperson. Good commanders recognise the benefits of soldier-media interaction. They seek opportunities to train their soldiers how to interact with the media and find opportunities to encourage this interaction.
   d. Journalists are not the enemy. The media is an important information channel to the Alliance public, and most journalists strive to publish accurate, truthful, balanced stories. Commanders need to understand that the media's goal is not to undermine, interfere or misrepresent, although some stories will be negative, and misunderstanding, errors and criticism will occur. By proactively assisting reporters in obtaining information and access to personnel, units help educate the public and foster confidence in our organisation. Remaining silent or uncooperative, leads to antagonistic, counterproductive results and incomplete, inaccurate and imbalanced stories. Remember, if we don't tell our story, someone else will tell it for us.
   e. ‘Maximum disclosure with minimum delay’. The Alliance has an obligation to keep the public informed. Therefore, information will be made readily available, within the bounds of OPSEC. Information should not be withheld solely to protect the mission from criticism or embarrassment. When speaking with a reporter be honest, accurate and candid. However, understand your commander’s information strategies and your role in supporting his objectives.

3. In dealing with the media, commanders and their soldiers must remember the following:
   a. Know to whom you are talking. When a reporter comes to your unit, verify his credentials.

      (1) If the reporter is properly accredited, assist him in gathering information for his story.
(2) If the reporter is not accredited, inform him that he must be accredited through military channels, and assist him in getting accredited. If he is uncooperative, do not detain him, threaten him, or try to apprehend him.

(3) Report the incident through your chain of command and to the PAO.

b. **Know your rights.** It is your choice whether or not to speak to reporters. If you decide to speak with a reporter, you may talk without fear of repercussion or punishment. Keep your answers brief, simple and to the point. Avoid rambling explanations full of acronyms and jargon. Always be both professional and courteous. If necessary, ask the reporter to repeat, clarify or rephrase their questions. Remember that it is okay to say you don't know, you may refuse to answer any question you feel is inappropriate, and you can end the interview or conversation any time you desire. If you chose to end an interview or conversation or chose not to speak with a reporter, know how to do it without causing animosity, anger or frustration.

c. **Know your limits.** Stick to subjects within your own area of responsibility and personal knowledge. Stay in your lane.

d. **Remain Truthful.** If you don't know something, say so. Don't speculate! Don't repeat rumours! Be honest, accurate and candid. Do not respond to hypothetical questions, or comment on remarks or statements you have not seen or heard. Do not discuss situations, issues, or subject matters which are outside the expertise of your command.

e. **View media visits as opportunities.** Provide escorts and support to accredited media whenever possible. Emphasise the positive aspects of your unit and mission, but don’t try to hide problems. Introduce the reporters to your soldiers. Show them your equipment and training. Let them understand your motivation, pride and morale. Their inside look at your unit can result in favourable coverage for your people, their accomplishments, the operation and NATO.

f. **Maintain 'Security at the Source'.** Don’t violate OPSEC or aid adversaries. Actual and potential adversaries have access to the information published by the media. The most effective way to protect classified or sensitive information that might jeopardise your personnel, unit or mission, or be used as propaganda against our nation and force is to practice security at the source. If information is inadvertently provided, remain professional, seek the reporter's assistance and cooperation or obtain assistance through the chain of command. Do not attempt to forcibly confiscate the reporter's film, notes or equipment, or detain, threaten or apprehend the reporter.

g. **Maintain professionalism and composure.** When interacting with media, you must always maintain a professional attitude. Never lose your composure or temper or give sarcastic responses to questions you feel are inappropriate. Never try to mislead, equivocate or rationalise. Never threaten,
or attempt to physically interfere with, detain, or apprehend a reporter. Never try to confiscate a reporter’s equipment. Your Rules of Engagement (ROE) and SOPs should include policies in dealing with the media.

h. **Prepare your Personnel.** Prior to meeting with the media, personnel should be; made aware of PA guidance, informed of the NATO perspective, themes and messages, and briefed to ensure their information is accurate and up to date. They should not be told what they can and cannot say but should understand the significance of their actions.

i. **Incorporate media contact into your SOPs, training scenarios, and rehearsals.**

   1. Just as you task organize your unit for CASEVAC and POW\(^{25}\) search, so should you designate and train media contact teams. Train these teams to understand how to deal with the media just as in any other battle drill.

   2. Interject media scenarios into your training. Periodically include PA classroom training and media role-players into field training.

   3. Rehearse actions on media contact as part of your preparation for combat and troop leading procedures.

j. **Report Media contact.** Report all media interaction to your command and the PAO. Use the PAO AAR format when possible. This allows the PAO to track media trends and effectively address the media requirements. Also, good feedback assists the command in developing realistic training scenarios.

4. **Understand the resources available** to assist you with your PA programme.

   a. **Seek PA guidance.** Your chain of command or UPAR should be able to provide appropriate TPs, themes and messages for anticipated media contact.

   b. **Seek assistance from the PA Staff.** The PAO is trained and resourced to advise and assist you in developing and executing your media training programme.

**PAO Contact Information** – (insert e-mail, phone and mobile numbers)

---

\(^{25}\) Prisoner of War.
Annex 7-E  Interact with Media (Non-PA Service Member Training)

<table>
<thead>
<tr>
<th>Service Member's Name and Rank</th>
<th>Unit</th>
<th>Date</th>
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**Requirement:** Train non-PA service members to interact with the news media in a tactical environment.

**Guidance:** Train non-PA service members to perform the following functions:
- Determine whether he/she may participate in a media interview.
- Follow prior guidance put out by the chain of command.
- Military personnel have the right to express their personal opinion.

**Performance Measures.** Service member successfully:

- **Identified legitimate media.** Checked ID and press credentials. If the journalist produces identification and press credentials, continue with the interview. If not, referred the journalist to the chain of command or PA representative.

- **Recognised rights.** Service member recognised the right to speak or not to speak to the media; understood he did not have to answer all the questions; controlled the length of the interview.

- **Recognised obligations.**
  - Maintained OPSEC;
  - Exercised good judgment and professionalism at all times;
  - Made no negative comments toward a race, religion or culture.
  - Respected host nation sensitivities.
  - Informed the chain of command of media’s presence, departure, the general nature of the interview and any violation of OPSEC or ground rules.

- **Implemented these guidelines when speaking with the media:**
  - Gave thoughtful, informed answers.
  - Did not lie or intentionally mislead the media.
  - Spoke at appropriate level; discussed only things that he has direct responsibility for, or personal knowledge about.
  - Did not speculate or answer speculative questions (what if) questions.
  - Avoided jargon, acronyms, slang and technical terms.
  - Kept remarks brief and concise.
  - Used "I" not "we" when stating an opinion.
  - Explained not being able to answer a question (e.g. OPSEC, personal privacy, etc.).
  - Avoided using "no comment."
This template is provided to configure and print double sided pocket media cards.

### Professional Interview Techniques

**Preparations**
The media is a vehicle for conveying your organization's messages to the public. If you don't have a clear sense of what you want to convey, how the headline should read, and what you want people to know about your issue, then the chance is slim that you will be satisfied with the result of your interview. To conduct a successful interview, answer questions in a manner that supports your messages. You may be asked questions that don't get to the points you wish to make. Content your messages at every opportunity.

- **Do** be prepared.
- **Do** tell the truth.
- **Do** keep your answer short.
- **Do** use plain English.
- **Do** use single, clear sentences to make your point.
- **Do** pause before answering.
- **Do** answer the question.
- **Do** communicate your messages.
- **Do** state your message clearly and powerfully.
- **Do** address your points to the public (reporters are not your ultimate audience).
- **Do** repeat your points.
- **Do** be friendly, honest and yourself.
- **Do** keep calm.
- **Do** use body language effectively.
- **Do** maintain eye contact.
- **Do** smile.

### General Tips

- **Reporters generally feel overworked, underpaid and on deadline.** Know this. Respect this.
- **You have more power and control than you think.** Information is power and you have the ability to use that power in a positive way as a source of information.
- **To conduct a successful interview, answer questions in a manner that supports your messages.** You may be asked questions that don't get to the points you wish to make. Bridge to your messages at every opportunity.
- **The physical appearance of a speaker should never overshadow what he or she has to say.** It can, however, make the message more convincing. Keep this in mind as you prepare for a public appearance. Viewers will decide within 8 seconds if you appear credible.

### Specific Guidelines for TV Interviews

- **Realise your interview will be substantially edited to fit into a short time frame.**
- **You are always on the air.** Say what you have to say, and then be quiet. Don't fill 'dead air'. This is an old journalist trick to get you to say something you really don't want to say.
- **If standing, put one foot slightly in front of the other to avoid swaying.** Avoid sudden body movements (standing up, leaning back in the chair) that may take you out of camera range. Hand movements should be small. Find a place to rest your hands and keep them there.
- **Make eye contact with the reporter.** Don't stare at the camera. Don't be distracted by activity near you.
- **Dress appropriately (conservatively).** Men - button coats if standing, unbutton if sitting.

### Specific Guidelines for Radio/Telephone Interviews

- **Use your voice to create variety and interest.**
- **Use descriptive language to illustrate your points to help the audience visualize what you’re talking about.**
- **Raise your voice slightly for key points and emphasis.**
- **Feel free to have notes of key points, facts, etc.**
- **Avoid ums, ahs and ‘verbal nodding’ - it sounds silly on radio.**
- **Make sure you can hear questions clearly.** If you are even slightly uncomfortable with the volume or connection, say so.
- **For in-studio radio interviews, sit 6 to 8 inches from the microphone.**
- **Ask the reporter for feedback to ensure he or she understands you.** With no eye contact or body language, this can prevent misunderstanding.

### Don'ts of Interviewing

- **Do not speculate or guess.**
- **Do not discuss hypothetical situations or unfamiliar matters.**
- **Do not offer personal opinions.**
- **Do not lie or bluff.**
- **Do not use jargon or long explanations.**
- **Do not lose your temper.**
- **Do not continue talking after you make your point.**
- **Do not fill awkward, silent pauses.**
- **Do not go ‘off the record’ unless you have good reason to trust the reporter.**
- **Do not fidget.**
- **Do not use sympathetic nodding, which could be interpreted as agreement.**
- **Do not wear sunglasses or a hat.**
- **Do not wear distracting clothing, as it gets in the way of your message.**

### Professional Interview Techniques

**Preparations**
The media is a vehicle for conveying your organization's messages to the public. If you don't have a clear sense of what you want to convey, how the headline should read, and what you want people to know about your issue, then the chance is slim that you will be satisfied with the result of the interview. Be prepared:

- **Ask yourself “What is my goal with this interview?”**
- **Know the key points you want to make (main messages).**
- **Have back-up data to support your points.**
- **Get to know the media outlet: the type of publication or programme, the interview format - live, taped, solo or multi-guest, length?**

### General Tips

- **Reporters generally feel overworked, underpaid and on deadline.** Know this. Respect this.
- **You have more power and control than you think.** Information is power and you have the ability to use that power in a positive way as a source of information.
- **To conduct a successful interview, answer questions in a manner that supports your messages.** You may be asked questions that don't get to the points you wish to make. Bridge to your messages at every opportunity.
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**Interview Techniques**

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Annex 7-G UPAR Media Facilitation Training

UPARs in recent operations have often been the primary POC for media embedded with their units. Therefore, PA should provide UPARs specific training in media facilitation. The following section should serve as a starting point.

1. **Objective:** Support news media efforts by providing accurate, timely, balanced, credible coverage of the force and operation while minimising the possibility that media will disrupt the operation.

2. **UPAR Media Escort Responsibilities and Checklist:**
   - You are NOT responsible for the physical safety of the media. Assist them as you would any other Alliance civilian in a combat environment. Instruct them and assist them in making combat-smart decisions.
   - Ensure media does not violate standing force protection measures, such as noise and light discipline.
   - Let leaders and service members do the talking.
   - Trust service members to tell the unit story and the Alliance public to listen.
   - Service members have the right not to talk – but not talking can send the message that the unit has something to hide – especially if the leaders avoid talking to the media.
   - Remember that media are influential members of the public.
   - Media are not the enemy – they are just out for a story. Make sure to tell your story.
   - Secure classified or sensitive information and/or equipment.
   - If you accidentally say or show something classified, remain calm, explain the situation and ask the media for their cooperation. Report the incident immediately.
   - Never detain or confiscate any material or equipment from bona fide media – it will make matters worse.
   - Do not refuse to speak to the media just because they are unescorted.
   - Be courteous.
   - MISSION FIRST.

3. **UPARs and Media Escort in Crisis Situations:**
   - PA staffing, remote locations and logistics limitations can sometimes prohibit PA from being there during every crisis situation. Media escorts and UPARs should be able to provide the following services for the media:
     - Coordinate with PA/command on messages and releasable OPSEC details.
     - Brief the media - the escorts must know the general situation or should have access to those who do. Arrange for briefing to the media to ensure accurate information is passed.
Brief the media on the risks of the situation. Do not needlessly put the media in harm's way. Media members, especially photographers, will often go to great lengths for a story, ignoring the risk which might put your fellow service members at risk.

- Protect classified material.
- Issue and collect identification. Provide badges for escorts and media.
- Coordinate with Military Police or base defence for site access (if applicable).
- Confirm and log entry and exit of media - maintain a record of entries and exits.
- Know how to navigate to/from the crisis site.
- Have the tools you need to get the PA job done (communications, messages, PAG, background materials, camera, etc.).
- Don’t speculate on causes – “an investigation is underway” is a good enough answer in the early stages of any crisis.
Annex 7-H  UPAR Interview Checklist

1. **Plan:**
   - Determine commander and PA intent for the interview.
   - Ask PA what types of media to expect.
   - Determine 'news issues' in your area.
   - Wargame possible questions and develop appropriate responses.
   - Identify media support requirements (background/backdrop, lighting, sound, power, etc.).
   - Develop itinerary with interview opportunities to support reporters' intent.
   - Review interview techniques with interview subject.

2. **Greet media:**
   - Be friendly and time conscious.
   - Coordinate itinerary with reporter.
   - Explain ground rules, military requirements, and safety and security concerns.

3. **Conduct the Interview:**
   - Monitor the interviews for time limits, OPSEC violations, confusion and inaccuracies.
   - Position interview to avoid OPSEC violation.

4. **Report results:**
   - Lines of questions.
   - Attitudes of reporter.
   - OPSEC violations.
   - Slant of the story.
   - Overall impression to PA and higher HQ.
   - Time and date of publication/airing.
   - Share info with other units.
Annex 7-I  Basic Photography Guidance for UPARs

1. Rule of Thirds. The rule of thirds uses two horizontal and two vertical lines to divide the photograph into nine equal parts (imagine a Tic Tac Toe grid). The subject's eyes should be placed at or near one of the four intersections, and his hands at another (if the hands are featured). Leave space within the photo for the subject to move or look into.

2. Move around for a variety of shots:
   - Long shot: It is normally shot 10 to 20 feet from the subject. Called an 'establishing shot', it shows the subject in his environment.
   - Medium shot: Normally taken from seven to nine feet, it identifies the subject and the action taking place.
   - Close-up: Like the medium shot, it is used to identify the subject and action taking place, only from a closer position, about three to six feet.
   - Extreme close-up: Shows important aspects of the subject's job in detail. Shoot as close as possible to the subject.
   - High and low angles: The key to a successful picture page is varying the shooting angle. The difference of angles creates interest and can lend power and strength to the subject if a low angle is used, or can indicate subject inferiority if a high angle is used.
   - Horizontal and vertical formats: The different formats are essential when designing a layout; it adds variety.

3. Take more photographs than needed. Sometimes lucky shots are the best. Subject movement and technical miscalculation may ruin a planned shot.

4. Record cutline information. For every person in the picture, get the first and last name, rank, unit, location, date and what they are doing in the picture. The cutline info can be embedded in the 'File Info' if you are using Photoshop, otherwise attach it in a word document or the email sending the photos.

5. ACO Policy on Editing and Alteration. Alteration of digital imagery, beyond what can normally be done in a darkroom is prohibited. Do not digitally alter photographs that are being submitted to PAO in any way.

6. Work with your local PAO to determine resolution and image size requirements. Generally, a high quality or raw .jpg file (1-2 MB overall size) will work. Photos should be small enough to email.
Annex 7-J  Family Members and Media Interviews

Military families often become the centre of news media attention. Because of this, family members should know these concepts when dealing with the press.

Service members and their families sometimes don't realize they can be the best (sometimes the only) sources of information for news stories. Their individual stories are often the best way to tell the military's story, good or bad. Family members should keep the following guidelines in mind when interacting with media:

- You have the right to say NO to an interview request. Some reporters have coerced family members into submitting to an interview by emphasising the public's 'right to know' and 'freedom of the press', but your right to privacy always takes precedence.
- It is NOT harassment if a journalist calls your home or stops you at the supermarket to ask for an interview. It IS harassment to infringe on your privacy or persist after being told "no".
- Your home is your property. No one, reporter or otherwise, has a 'right' to enter your home or property unless you grant them that privilege.
- If you decide to talk with the media, establish ground rules before the interview. Prior understandings are for your protection, and responsible, professional reporters will respect these.
- Know with whom you are talking. Before answering questions, get the reporter's name, organisation and phone number - especially if you are going to decline the request. Your caution will discourage the reporter from persisting.
- When you agree to an interview, remember that you give away some of your privacy. Always keep in mind the family's best interest when dealing with the news media.
- If you consent to an interview, you may not want your full name to be used. You should always ensure that your address is not used. Television pictures of your house are not a good idea. Explain to reporters that your wish to maintain privacy at your home will help protect your family from harassment by a wide range of people who could learn through press coverage where the family lives.
- Appearing on television or being written about in the newspaper could identify you as a target for unscrupulous salesmen, crank calls, or crime. Be especially cautious if your phone listing includes your spouse's rank and your address.
- Know who will hear you. Family members often have information that would be useful to an enemy. Make sure you understand adversaries also watch television and read newspapers for intelligence purposes.
- Know your limits. Talk only about what you know first-hand. It's okay to answer with "I don't know." Never make comments or answer questions that talk about what might happen or could have happened.
- Know what to keep to yourself. If your spouse calls or writes with news about casualties, unit locations, or deployment timelines, keep such information to
yourself. Deployments spawn rumours, and some of what you might hear could be wrong, sensitive, or subject to change.

- If you desire, contact your PAO for assistance. PAOs have a working relationship with the media and can provide advice that will help protect your privacy, yet allow the news media to report the story.
Annex 7-K  NATO Affiliated PA Training Opportunities

The following are PA training opportunities run by NATO’s ACT or as partnership programmes with other nations. Updates to this course list and detailed information may be found on the ACT website: http://www.act.nato.int/pao/pa-training.

1. **Basic Training.**

   - **Canada’s Defence Public Affairs Learning Centre (DPALC) Basic Public Affairs Officers Course.**

     As part of its Basic Public Affairs Officers Course (BPAOC), a seven months-long course conducted in English and French once a year, Canada offers a limited number of seats to international students.

     DPALC runs also a NATO version of its Defence Public Affairs. This two-week course is recommended for NATO military and civilian students who are designated for, or serving in, PA positions and require basic media and communications skills.

   - **France’s MOD Basic Public Affairs Course.**

     The French MOD (DICOD) organises a basic-level Public Affairs Course in Paris. The course is taught in French language only and lasts approximately two weeks.

   - **Germany’s Academy of the Bundeswehr for Information and Communication (AIK) International Public Affairs Course.**

     Germany offers a two-week International Public Affairs Course in English at AIK in Strausberg once a year for intensive communication training, including presentation and media skills. The course accepts a certain number of international PA practitioners.

   - **Hellenic Multinational Peace Support Operations Training Centre (MPSOTC), Greece.**

     The two-week course is conducted in English (SLP 3,2,3,2 required) and is recommended for students (OF-2 up to OF-5) who require basic media and communication skills. MPSOTC offers this course every year, normally in September.

   - **Hungary’s Basic NATO Public Affairs Course.**

     Hungary offers a two-week basic Public Affairs Course in English once a year, usually in May, available to NATO and PfP nations students. This course was validated against NATO standards and is recommended for military and civilian students who occupy PA positions and who require basic media and communication skills.
• Swiss PfP Media and Communications Course - Basic Level (Media Management).

The Swiss PfP Media and Communications Course Basic Level (Media Management) is held annually in the spring and typically accepts up to 22 students from NATO, PfP, Mediterranean Dialogue (MD), Istanbul Cooperation Initiative (ICI) and contact countries. It lasts eight training days, and is recommended for NATO military and civilian students who are serving in PA positions and who require basic media and communications skills. The Swiss have designated five seats for ACT nominees.

• United Kingdom's Defence Media Operations Centre (DMOC) UK Defence Communicators' Course.

The DMOC is based at RAF Halton. The UK's five day Foundation Media Course is typically held 11 times per year and accepts two non-UK students per serial with more on a case-by-case basis. A combination of both the Foundation and Advanced courses is recommended for NATO students who require basic media and communications skills, particularly junior officers designated for NATO operations. The UK Defence Communicators' Course is a two-week course that runs up to 10 times per year. This is a foundation course for all military press officers. In addition DMOC runs a one day Media Skills Course and a specific Afghan Environment Training course. The DMOC is also developing a crisis communications course and an OF3/4 planning course that are expected to start in 2014. (http://www.gov.uk/the-defence-media-operations-centre-dmoc)

• United States' Defense Information School (DINFOS) Public Affairs Course for International Students (PACIS) and Public Affairs Qualification Course (PAQC).

PACIS is intended for international military and civilian personnel selected to perform Public Affairs functions by governments of partner nations without formal PA training programme operating within the Security Cooperation and Training Programme framework (SCETP). The course lasts 25 days and is broadly based on existing DINFOS curriculum but emphasises comparisons and contrasts between US, NATO and UN approaches to PA. Applicants must score a minimum 85 on the English Comprehension Level (ECL) and obtain a 2+/2+ in an Oral Proficiency Interview (OPI).

PAQC is an entry-level PA training for selected foreign nationals. The course lasts 46 days and includes a distance-learning package. It is recommended for NATO military officers who are designated for or serving in PA positions and require comprehensive media and communications skills. Applicants must score a minimum 85 on the ECL, have completed Specialised English Training (SET), and obtain a 2+/2+ in an OPI (more information in http://www.dinfos.dma.mil/index.asp).
2. **Advanced Training.**

- **Swiss PfP Media and Communications Course - Advanced Level (Crisis Communication).**

  An advanced course is held every year, usually in the autumn, and typically accepts 16 students. With its emphasis on communications teamwork and individual skills, the advanced course is recommended for NATO students who will be assuming the duties of a CPAO or spokesperson. There are five seats available for ACT nominees.

- **United Kingdom’s Defence Media Operations Centre (DMOC).**

  The UK DMOC may accept up to 2 non-UK students on any of their courses. A combination of the Defence Communicators Course and the Afghan Environment Training is recommended for NATO students.

- **United States’ Defense Information School (DINFOS) Joint Intermediate Public Affairs Course (JIPAC).**

  DINFOS offers JIPAC, an advanced PA course (21 days) for mid to senior-level officers and civilians serving in CPAO or deputy PAO positions. Applicants to the advanced course must score a minimum 85 on the ECL and have completed SET), an OPI and must be graduates of the Public Affairs Qualification Course (PAQC) (46 days) offered at the same school. Note that the JIPAC course covers US policy-specific curriculum that may not be applicable to foreign students.
Annex 7-L  Staffing of Public Affairs Positions for Unforecasted Operations, Missions, and Deployments

1. Generation of PA Positions at the Commencement of an Operation, Mission or Deployment.

a. When ACO is called upon to generate and deploy forces for unforecasted operations, missions and deployments, PAOs will be among the first required to commence their duties in support of overall objectives. Given that very few Allies force produce formally qualified and experienced PAOs, generating this capability at the commencement of an operation, mission or deployment has been identified by NATO HQ as a shortfall. As such, the first rotation of PAOs deployed to an unforecasted operation, mission, or deployment will consist primarily of a surge capability of officers already working from within the NCS.

b. SHAPE, both JFC HQs, and all three CC HQs will be expected to identify suitable and qualified PAOs and ensure they are prepared for short-notice deployments. SHAPE will identify and prepare four officers, JFC HQs will identify two officers each, and CC HQs will identify one officer each. The names and particulars of these officers will be forwarded to SHAPE in September and March of each year. The bulk of any required initial surge capacity in support of an unforecasted operation, mission or deployment will be formed from this established cadre of officers. The normal duration of such a surge will be three months, which will allow the normal force generation process the time needed to identify suitable officers from Allied nations to fill subsequent rotations.

2. Qualifications of Public Affairs Officers for Operations, Missions, and Deployments.

a. Key PA positions on NATO operations, missions, and deployments must be staffed by officers that possess a minimum level of PA experience. The CPAO for an operation, mission, or deployment, as well as the Deputy CPAO must have completed the following:

(1) A NATO-accredited national basic Public Affairs Officer course;

(2) a minimum of three years of experience working in Military PA positions;

(3) a minimum English SLP level of 3, 3, 3, 3; and

(4) completion of the NATO Public Affairs Policy Indoctrination Course and the NATO Public Affairs in Operations Course is desirable. If this NATO-specific qualification is lacking, the requirement can be waived if the prospective CPAO /Deputy CPAO completes a two-day briefing programme with SHAPE and NATO Press and Media.
b. PA Desk Officers working in Media Operations while on NATO operations, missions, and deployments must have completed the following:

(1) A NATO-accredited national basic Public Affairs Officer course;

(2) a minimum of one year of experience working in Military PA positions;

(3) a minimum English SLP level of 3, 3, 3, 3; and

(4) completion of the NATO Public Affairs Policy Indoctrination Course and the NATO Public Affairs in Operations Course is desirable, but not mandatory.

c. It is desirable that all other PAOs deployed on operations, missions and deployments possess the same qualifications and experience as above, but it is recognised that exceptions will have to be made in the medium term due to the shortfall of qualified PAOs within NATO. Therefore, positions in media monitoring, internal communications and web/social media may be filled by personnel lacking certain qualifications or experience. However, a minimum English SLP level of 3, 3, 3, 3 will be required for all positions within a deployed PA cell.


Chapter 8

Public Affairs in Exercises

“Train as we fight!”

“Exercises are an important tool through which the Alliance tests and validates its concepts, procedures, systems, and tactics. Exercises also provide an opportunity to build interoperability... and contribute to defence reform.”

– NATO Website

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a. NATO conducts more than a hundred exercises and training events of varying sizes every year. These exercises provide opportunities to train personnel at all levels in how to respond to media and ensure that NATO’s missions are presented fairly. They also provide excellent opportunities to showcase NATO’s capabilities and objectives. There are two distinct areas of PA activity relating to exercises: the real-world requirement and the exercise requirement.

b. This chapter should be read in conjunction with Bi-SC Collective Training and Exercise Directive (CT&ED) 75-3, and serve as an in-depth ACO PA reference on PA role in exercises.

8.2. PA Approach – Real World.

a. The real-world PA approach chosen for an exercise must be selected
in accordance with the guidance provided in the Alliance’s current Military PA policy, MC 0457/2, and must be consistent with the policies of the HN, participating nations, operational security and the privacy of the personnel involved. This might vary from Reactive to Very Active depending on an assessment of the factors listed below. The appropriate level of real life PA activity and any exercise specific PA objectives will be determined by the Officer Scheduling the Exercise (OSE) during drafting of the Exercise Specification (EXSPEC). Primary responsibility for real world PA activity rests with the PAO of the Officer Conducting the Exercise (OCE).

b. Working with the HN, exercise related real life PA goals and objectives must also ensure that:

- Timely and accurate information is made available so that the public understand the facts and issues associated with the exercise; and
- COMREL activities sensitise the local population in the exercise area to the temporary increase in activity during the exercise and seek to minimise any negative impact that might arise as a result.

c. Each exercise should be assessed by a PA practitioner in the OSE against standard PA criteria and the following additional factors:

- The Vienna Document, brokered under the auspices of the Organisation for Security and Cooperation in Europe (OSCE), requires signatories to provide advance notification of some types of live exercises. As most NATO nations are signatories, there are implications for exercise planning. If there is a notification requirement, the PA syndicate must avoid pre-empting the formal notification process with a NATO media release.
- The level of PA effort should be measured against the return on investment. Is the desire to keep the public informed of the important role of the exercise commensurate with the anticipated public/media interest?
- Political and public sensitivities; (CBRN weapons, Counter Terrorism, CIMIC, etc.);
- Security requirements;
- The visibility of the exercise. Is the public or media likely to become aware of the exercise even if a Reactive approach is adopted?

d. If real media interest is anticipated, a decision regarding execution and resourcing of the real world PA plan should be taken at the Main Planning Conference (MPC) by the PA Syndicate (see para 8.4.c. below). Where the training audience (TA) is not able to meet the real world requirement the OCE HQ PA staff are to take the lead. Any augmentation requirements should be determined at the MPC and augmentation requests initiated.

e. Even if a real world Reactive PA approach is adopted, the PA Annex (Annex L) to the Exercise Plan (EXPLAN) must include responses to potential questions and agreed media lines.
8.3. **PA Activity in Exercises.** PA exercise activities must be developed in the context of the wider exercise scenario. In general, PA activity should be a consequence of activities and storylines developed to drive events in the exercise situation. Media injects should not be used to drive the scenario or inform the Training Audience (TA) about events in a way that encourages them to believe that media reports are necessarily accurate or a basis for military decision making.

8.4. **Exercise Planning.**

a. In order to add value to the exercise planning process, NATO Military PAOs must understand the exercise planning terms and the system for programming/planning exercises described in MC 0458/2 and CT&ED 75-3. Both provide the strategic direction for the entire process of exercise planning from concept through to execution and analysis.

b. NATO Military PA offices should maintain a planning calendar that includes all planned exercises with PA timelines and milestones.

c. A StratCom/PA syndicate\(^26\) must be established at all planning conferences. This Syndicate should, if possible, comprise representatives from PA elements of all major headquarters participating in the exercise (NATO, national, and ACO military), the chief of the exercise NMOC, if any, and the HN. The syndicate is also responsible for ensuring that the overall exercise PA objectives are integrated into overall exercise planning from the outset of the planning process to exercise execution.

d. PA planning for an exercise should normally start at the early stages of exercise planning and should cover the following subjects:

- During the **Concept and Specification Development Stage** the PA approach and objectives are developed. They are included in the EXSPEC to facilitate the conduct of future PA events in terms of manning and funding;
- During the **Planning and Product Development Stage**, the syndicate must ensure that the EXSPEC contains appropriate objective(s) in the list of primary exercise objectives. This is important to ensure that the PA function is exercised;
- The syndicate will produce the PA Annex (Annex L) to the EXPLAN. This Annex (see template at Annex 8-A) follows the STANAG 2014 standard five paragraph format. Possible PA Outputs are listed at Annex 3-L. While not exhaustive, the list gives exercise planners some ideas to incorporate into their PA plan.
- To add further realism to the exercise play simulated press may be provided by the Joint Warfare Centre (JWC) or other organisations within the NCS, depending on their capabilities (e.g. NATO HQ PDD for CMXs).

\(^{26}\) Many exercises (e.g. Crisis Management Exercises, CMXs) require a StratCom Syndicate which may include PA or be combined with the PA one.
The syndicate is to determine the simulated press requirements in terms of strength, composition and supported HQs; if applicable.

- If an Initial Exercise News Release (IENR) is required it shall be submitted to the OSE for approval. Supporting information may be required especially where the exercise is thought likely to attract media attention or be controversial.

- Depending on the nature of the exercise PA planners might be involved in Main Events List/Main Incidents List (MEL/MIL) development and during the execution they could be asked to assume an Exercise Control (EXCON) role such as Higher Control (HICON) (simulating SHAPE or NATO HQ) or observer/trainers.

8.5. **Live Exercise (LIVEX) Considerations.**

a. LIVEX, with their inherent troop deployments/movements, are the most visible exercises, usually with high public and media interest. In most cases this will necessitate a Very Active PA approach to be applied.

b. Exercises with sensitive environmental issues or in sensitive environmental areas (maritime and amphibious exercises in particular), will require careful planning and considerable thought and research must be put into developing Q&As regarding the likely issues.

c. Land exercises, by their very nature, frequently require public announcements sooner than naval or air exercises. The necessity for concentration of major formations in advance of the exercise, movements of forces by rail or road, warnings to local populations, and the possible negotiations for use of land, makes it evident that an exercise is to be held. Since there is no particular security advantage in withholding this information, such exercises require advance community relations activity.

d. Air exercise PA planning should be determined primarily by the nature of the individual exercise. Increased take-offs and landings, disruption of civilian flights and low-level flying will generate public interest and other concerns. PA arrangements should include coordination prior to the exercise with the appropriate national and international PA authorities, and should include engagement with communities likely to be affected.

8.6. **Command Post Exercises (CPXs).** By their nature, CPXs have a low visibility. Therefore an Active or Reactive PA approach is likely to be more appropriate, unless events such as involvement of civilian authorities/agencies, NGOs, use of civil or new military infrastructure, deployment of command post and signal units, etc. are involved.

8.7. **Other Planning Considerations.** The following planning considerations should be taken into account:

a. Countering Weapons of Mass Destruction (WMD):
• when CBRN or theatre missile defence (TMD) capabilities are being exercised a clear distinction should be made between whether the exercise is a LIVEX or CPX;

• should these exercises include simulation of enemy explosions or chemical attacks, photographic coverage may be permitted. It should be stressed that the devices used are intended for simulation only;

• CPX incorporating CBRN events are ideal for training PA personnel from the training audience in handling this very sensitive topic. As a general rule, the exercise news release should abide by the sensitivity of the subject and, more specifically, only address hostile WMD use after coordination and with the authorisation of the “victim” nation; and

• planners should ensure that guidance is sought on all likely areas of media interest to ensure the NMIC staff is fully briefed on Alliance PA and HN policy concerning WMD, TMD and CBRN issues.

b. CIMIC Activities:

• a clear distinction should be made between LIVEX and CPX;

• exercising CIMIC is an excellent vehicle to demonstrate defence preparedness, co-operation and HN support. Specific PA objectives and plans should be devised and coordinated to emphasise this aspect of an exercise; and

• it is worth remembering that some aspects of CIMIC are less palatable (evacuation, requisition, mass burials). The possible negative implications of those aspects should be carefully considered by exercise planners and coordinated with the HN.


a. The OCE PA staff, in consultation with the HN, should make a recommendation on the requirement for an IENR in line with the set PA approach. Factors including the exercise intent, size, scale, scope, geographic location, nations participating and political and cultural sensitivities as well as former experiences should all be taken into account. If there is a question of considerations or sensitivities listed above, then the OSE should seek guidance from higher HQs. If NATO MC approval is likely to be required for an IENR, then it must be staffed through the chain of command and the PA TechNet. The proposed IENR must be therefore submitted to SHAPE PAO at least six weeks before the intended publishing date to allow sufficient time for staffing through to the International Military Staff (IMS) Public Affairs and StratCom Advisor (IMS PA&SCA) and the MC. All supporting PA products contained in Annex L to the EXPLAN (e.g. media lines/responses to query, fact sheets/backgrounders, etc.) shall be forwarded through the OSE PAO (or higher HQ PAO) for review and to support IENR approval.

b. The OCE PAO retains responsibility for real world PA support to the exercise throughout and is encouraged to issue news releases and
communiqués describing the progress of an exercise in accordance with the OSE approved PA approach. If the scope of the exercise is limited, it may be considered desirable to make a summary release after the exercise, or to issue the IENR only. Information copies of all news releases and communiqués issued during the exercise are to be forwarded promptly to the higher HQ PAO responsible for monitoring exercise PA activity. Copies of all news releases and communiqués should be included in the exercise PA assessment which will be used to inform the Final Exercise Report.

c. PA planners are to ensure that the NMOC has an emergency response plan available for dealing with accidents and casualties. The release of casualty information policy outlined in the Enclosure B of this Handbook, ACO Policy for the Release of Information, also applies for NATO exercises and should be addressed in the Annex L to the EXPLAN.

8.9. Security. Each exercise requires a deliberate PA assessment to identify specific information to be released. PA planners must practise appropriate OPSEC, ensuring exercise related information that might be detrimental to the security interests of any member nation, participating nation or the Alliance as a whole, will not be disclosed to the media. PA activities must be conducted in accordance with NATO and national security policies and the privacy of forces and personnel involved.

8.10. NATO Media Operations Centres (NMOCs) - Real World Support to an Exercise.

a. As long as the PA approach and the type of exercise require it, the OCE is responsible for establishing the NMOC in co-ordination with the HN. It should be located as near to the centre of exercise activity as practicable, must be easily accessible to media representatives and at a location from where media will be able to file their stories in a timely manner. The NMOC is to provide the media with timely, truthful and accurate information on exercise issues, events and activities and to provide other support, advice and assistance as necessary.

b. The NMOC tasks and functions are described in Annex 4-A.

c. NMOCs will not normally be collocated with visitor or protocol centres, nor should NMOC staff members be assigned protocol or other duties involving visitors other than media. The NMOC, will, however, need to maintain close liaison with the Visitors and Observers Bureau (VOB) since distinguished visitors to the exercise may generate media attention.

d. Visit programmes for observers and VIPs should not interfere or intersect with visit plans for media and vice versa. There should be no interference with the plans for observers, but plans for the latter should be coordinated with plans for media representatives.
8.11. **Invitations to Media - Real World PA Support to an Exercise.**

   a. The OCE or HN must plan for and provide facilities for media.

   b. If the decision is made to invite media to NATO exercises, invitations must be accompanied by sufficient information about the exercise to stimulate interest.

   c. Where it is necessary to issue invitations to media in advance of the IENR, this informal invitation should also stipulate that details of the exercise, except as already announced in annual calendars, are embargoed until the publication of the IENR.

8.12. **Registration/Accreditation of Media Representatives - Real World PA Support to an Exercise.**

   a. The NMOC Chief, will register media by maintaining a list of visiting correspondents and their affiliations. Formal registration shall be done in order to facilitate control within, or access to, certain exercise areas, or to obtain information required to arrange transport/accommodations for correspondents. An example of Media Registration Form is included in Annex 4-U.

   b. Formally registered media representatives will be issued a Media Identification Card.
Annex 8-A  Annex L to EXPLAN - Format

References:


C. AD 095-001 “ACO Public Affairs”, dated 4 June 2013

D. ACO Handbook 2014, dated June 2014

REAL WORLD

1. SITUATION.
   a. General
   b. Media Trends
   c. Assumptions

2. MISSION.

3. EXECUTION.
   a. PA Approach
   b. Concept of Operations
   c. PA Objectives
      (1) External
      (2) Internal
   d. PA Organisation (see Appendix 1)
   e. Audiences
      (1) External Audiences
      (2) Internal Audiences (NATO wide)
f. Initial Exercise News Release (IENR) (see Appendix 2)
g. Master Messages/Responses to Query (see Appendix 3)
h. Other PA Products (e.g. Fact Sheets/Backgrounders) (see Appendix 4)
i. Planned Media Activities
j. Tasks
k. Coordinating Instructions
   (1) (List any requirements from key organisations)
   (2) Release of Information
   (3) Media Registration
   (4) Imagery Support
   (5) Procedures for Reporting of Casualties/Accidents/Incidents

4. SERVICE SUPPORT.
   a. Facilities
   b. Equipment

5. COMMAND AND SIGNAL.
   a. Points of Contact
   b. Signals

APPENDICES

(List as appropriate)
Appendix 1 – PA Organisation for real world and exercise play
Appendix 2 – Initial Exercise News Release
Appendix 3 – Master Messages/Responses to Query
Appendix 4 – Other PA Products (examples include fact sheets, backgrounders, imagery)
Appendix 5 – Templates (Media badges, PA SITREP form)
Public Affairs Fact Sheet for Exercises - Format

APPENDIX 4 TO
ANNEX L TO
......... EXPLAN PART 1
DATED ............... 

PUBLIC AFFAIRS FACT SHEET
for
EXERCISE ..........................
(template)

A. EXERCISE BASIC DATA.
NICKNAME:
FORM/TYPE: E.G. CPX, LIVEX, SYNEX, CAX, etc.
EXECUTION DATES:
LOCATION: (Geographical)
PARTICIPATING HQs, NATIONS:
TROOPS NUMBERS, MAJOR ASSETS: (provide details by nation)

B. CONCEPT AND SCALE OF THE EXERCISE.
Provide a brief overview of the exercise scenario (not more than two paragraphs).
When did planning begin? When and where did the IPC, MPC and FPC take place?
When was the location agreed? Was the exercise open to PfP, ICI, MD, etc.? Is it linked to other exercises?

C. OTHER PLANNING CONSIDERATIONS.
1. Live Firing Exercises (time, location, weapon/ammunition used).
2. Involvement of civilian authorities/agencies/NGOs, etc.
3. Use of civil or new military infrastructure.
4. Deployment of command post and signal units.
5. Weapons of Mass Destruction (WMD); Chemical, Biological, Radiological, Nuclear (CBRN) or Theatre Missile Defence (TMD) capabilities involvement or exercises.
6. If there are political sensitivities, what are they?

D. CONTACT DETAILS:
OSE OPR and PAO (phone and email).
OCE OPR and PAO (phone and email).
Chapter 9

Imagery

“... modern wars are won on television screens and Internet websites. These are the battlefields that really matter, the arenas that frame the war and the scoreboards that determine the losers and the winners.”

Gabriel Weimann
Author, “Hezbollah Dot Com”

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9.1. **Introduction.** Photo and video imagery are vital tools to enable NATO to tell its story effectively. Striking images and video can be transmitted to news media, used on NATO websites, member nation websites, and in exhibits, print publications, social media sites and in DVD productions. Therefore all PA plans and activities shall include imagery as one of the key deliverables.

9.2. **Use of Social Media Sites.** The creation of photostreams on other web sites (e.g. Flickr, Smugmug, Facebook, etc.) is permitted but content should be managed as part of the overall PA effort. Despite the increased use of social networking sites and online imagery sites mainstream media still provides the most effective channel to reach a mass audience and as such making imagery available via mainstream media should be given priority. This chapter should be read in conjunction with Chapter 10, Social Media and Internet-based Communications, as imagery is integral to good Command websites.

9.3. **ACO Imagery use by Conventional Media.** Media organizations will generally want to use images generated by their own or independent sources however they will use military photographers’ material when images are unique or compelling. Where an image or series of images support a media release they
should be offered to the media before being used on other channels. Such images should be offered via the primary ACO distribution channel which is the DVIDS.

Based on operational intent, it may be appropriate to delay uploading of the same images to social media sites by 48 hours to allow mainstream media a period of exclusivity.

9.4. **DVIDS.** DVIDS is a 24/7 operation that provides a timely, accurate and reliable connection between the media around the world and the military. The service is provided free to NATO through a contract maintained by the U.S. Army. Due to the existing relationship between this contractor and U.S. Public Affairs, this capability has been adopted by ACO as the primary tool to provide imagery to both the media and the public.

DVIDS operates a distribution hub in Atlanta, Georgia making available, to the media, real-time broadcast-quality video, still images and print products as well as immediate interview opportunities with service members, commanders and SMEs.

An ACO structure has been established in DVIDS with sites for SHAPE and the JFC HQs. Larger missions may also have sub sites created. Each site must have a designated administrator, nominated through SHAPE Public Affairs Social Media office. CPAOs should ensure that their staff and PA offices from their subordinate units/supported missions register as contributors on the most appropriate site and upload press releases, photo stories and good quality “b” roll. Further advice is available from SHAPE PAO.

DVIDS provides that following benefits to deployed PAOs:

- Facilitates remote interviews with commanders and SMEs engaged in fast-breaking news.
- Promotes products posted on its site to hundreds of media outlets.
- Links media to deployed military units.
- Enables embedded journalists to transmit broadcast quality video from the field.
- Provides reporting features allowing units and contributors to identify when and by whom their material has been used.
- Fulfils requests for products quickly via satellite, fibre and the Internet.
- Submits daily bulletins detailing archive additions and email alerts about breaking news.
- Maintains a searchable archive of video, photo and print products.

A brief primer and basic contact information for DVIDS can be found at Annex 9-E.

9.5. **Imagery Standards.** Annexes 9-A, 9-B and 9-C respectively describe the standards to be applied to still photos and some helpful tips on taking good photographs, writing photo captions and cutlines. Annexes 9-D and 9-E describe the
standards for video products and use of the DVIDS capability. Finally, Annex 9-F covers the use and production of ‘hometowners’.

9.6. **Technical Requirements.** ACO imagery/photo technicians participating in deployed operations must have access to a transmission capability (internet connection, satellite modem, mobile phone or PDA) in order to transmit time sensitive imagery.

9.7. **Imagery and Privacy.**

   a. In general, photographing or filming an event should not present any problems. However, recent court cases in some member nations may have created precedents about photographs being published in newspapers without the consent of the people depicted in these pictures. In developing countries, people may ask to be paid for having their picture taken. As a rule of thumb, ask permission wherever possible before publishing pictures.

   b. NATO personnel performing their regular tasks should reasonably expect that NATO PA/imagery staff will take their picture, i.e. people on parade, unless the circumstances support that an expectation of privacy is present e.g. in a hospital or at a private event such as a funeral or wedding. If possible and if safe to do so, explain in advance what you are doing and have the subject sign a photo release form.

9.8. **Image Editing and Alteration.**

   a. In order to uphold the credibility of Allied Command Operations, ACO PA imagery must accurately depict real life situations. Alteration of content or misrepresentation of events alters that accuracy and will inevitably lead to an erosion of trust in and credibility of the organisation.

   b. Technology offers the ability and temptation to alter photographs with relative ease. Some alteration (i.e. touching up the photo, colour balancing, etc.) is certainly authorized, but altering the content or editing the photo to change the meaning is most certainly not. The following are the ACO general guidelines and limits for imagery editing.

      (1) Ethics and guidelines used for creating and working with standard photography will be the same for digital imagery. Enhancing the technical quality of a photograph is acceptable, but changing the meaning is not.

      (2) The changing, altering or manipulating the content of a photo (e.g. changing the positions and appearance of people and objects) or alteration that misleads or misrepresents its accuracy is not authorized for public release.

      (3) Copyrighted materials cannot be altered without written permission of the copyright holder (generally the creator or source of the original photo).
(4) It is authorised:

- Electronic equivalents of established practices for traditional darkroom printing methods (e.g. dodging, burning, toning, and cropping) as long as the content and meaning aren’t changed.
- Colour and tonal correction to ensure accurate reproduction of the original image.
- Technical touch-up of images for the purpose of colour-balancing or removal of flaws (such as dust spots, scratches, digital noise, artifacts, etc.) to achieve better reproduction. Such changes will be considered to be insubstantial.
- The use of cropping, editing, or enlargement to selectively isolate, link, or display a portion of a photographic or video image is not considered alteration. However, cropping, editing, or image enlargement that has the effect of misrepresenting the facts or circumstances of the event or object as originally recorded constitutes a prohibited alteration.
- Conversion of a colour image to black and white.
- The obvious masking of portions of a photographic image in support of specific security and criminal investigation requirements is authorized.

(5) It is not authorised for public release:

- Altering the content of an image (e.g. moving, adding, deleting, combining, stretching, flipping, shrinking, etc.).
- Misrepresenting a staged or manufactured scene as an actual event.

c. Photo Illustrations.

Photo illustrations differ from news photos in content, creation, and purpose. They are staged or produced, and are manufactured situations. When an existing photograph is altered for artistic purposes, such as by adding or deleting content, it also is considered a photo illustration.

When publishing a photo illustration, it should be made clear to readers that the image does not represent a real situation. In all cases, photo illustrations should be labelled as such. Any permitted alteration changing the original content of an image must be labelled as a ‘photo illustration’. The credit line should read: ‘Photo illustration; original photo by XXX’.

Artistic use of images, as in a collage, is permitted.
9.9. Imagery Terms.

**ACO COMCAM Imagery** - COMCAM imagery recorded in the NATO multi-national environment.

**Allied Command Operations Imagery Section (ACOIS)** - The central reception and distribution point for NATO ACO Imagery. Operated and maintained by the Public Affairs Office, Supreme Headquarters Allied Powers Europe.

**Caption Data** - Short explanatory or descriptive data accompanying imagery. Caption data records include shot sheets/lists, camera operator’s notes in either paper or machine-readable form, and, in digital still images, embedded International Press Telecommunications Council (IPTC) header captions.

**CODEC** - A codec is a device or program capable of performing encoding and decoding on a digital data stream or signal. Codecs encode a video stream or signal for transmission, storage or encryption and decode it for viewing or editing.

**Combat Camera (COMCAM) Imagery** - Still and motion imagery of military operations acquired by COMCAM forces, regardless of the medium in which the images are acquired, transmitted, or displayed.

**Cover Story** - A story accompanying imagery which describes the event, operation, action, or activity that the imagery depicts and puts the imagery in a context that the viewer can understand.

**Imagery** - A visual representation of a person, place, or thing recorded and stored in any format on a physical medium.

**IPTC Headers** - Caption data that is embedded into a digital still image as part of the image file, and conforms to the standard developed by the International Press Telecommunications Council (IPTC).

**Scene** - All the shots that record a unit of continuous related action(s) but which may include changes in camera angles, camera field of view, pans, or zooms. There is a change of scene when there is a jump to either an unrelated subject or series of action(s) or events, or a change in the geographic location of the subject(s). Thus, imagery of visiting dignitaries that showed them descending from the aircraft, meeting with the commanding officer in his office, and reviewing troops on the parade ground would all constitute separate scenes.

**Sequence** - A series of shots that record a unit of continuous related action(s) in which there is no change in subject matter or geographical location of the subject(s). A sequence can contain shots in which the camera operator changes camera angle, camera field of view, or there is a constant change preceded and succeeded by a shot or sequence of shots that are discontinuous (as in a pan, zoom out, or zoom in).

**Shot** - A single segment of motion media that typically can be identified as a close up (CU), medium shot (MS), long shot (LS), or establishing shot (ES), etc. A shot is a single element which when combined with additional shots makes up a sequence.
**Still Images** - Visual representations or images that are recorded or rendered on a two-dimensional surface or screen by chemical, electronic, or artistic means. Still images fall into three categories:

**Still Photographs** - Chemically based images recorded in a camera as either photographic negatives or colour transparencies.

- **Still Digital Images** - Electronically based images that are recorded (either as camera originals in a digital camera or as copies from an analogue photographic or image medium) and stored as machine-readable digital files. They include digital still videos, digital images, digital scans of photographs, and digital frame-grabs of motion video or television broadcasts.

- **Graphic Art** - Relating to the design, creation, and preparation of two and three-dimensional visual aid products. Includes charts, graphs, posters, and visual materials for brochures, covers, television, motion pictures, printed publications, displays, presentations, and exhibits prepared manually, by machine, or by computer.

**VI Material** - Any still and motion film, videotape, disk, or other media that contains visual information. This includes the original, intermediate, master, and any duplicate, print, reference, or dub copy.

**VI Media** - Any films, videotapes, discs, or other physical objects that contain or are capable of containing visual information.

**VIRIN** - Visual Information Record Identification Number. An alphanumeric designator assigned to a VI record other than a VI production. The life cycle number under which VI records are managed. For the format of the VIRIN, see Enclosure 1.

**Visual Information (VI)** - Information in the form of visual or pictorial representations of person(s), place(s), and/or thing(s), either with or without sound. VI includes still photographs, digital still images, motion pictures, analogue and digital video recordings, and hand- or computer-generated graphic arts and animations that depict real or imaginary person(s), place(s), and/or thing(s), and related captions, overlays, and intellectual control data.
Annex 9-A ACO Still Photo Guidelines

1. Preparing Still Imagery for Submission.

Using the established procedures for your particular camera make and model, prior to shooting ensure the camera is set to the highest resolution available preferably a camera raw format (RAW, NEF, CRW) or Adobe DNG, and that the date, time and time zone are correctly set. Once imagery has been recorded, download and save the digital files to a local computer.

Regardless whether filming in JPG or a raw format, rename the pictures according to the guidelines below and fill in the IPTC content.

If using a raw format, open the files in Photoshop and edit the photographs (colour, cropping, etc.) and save as JPG with the following settings:

- File Format - JPEG.
- Quality - Level 12.
- Format Options - Baseline ('Standard').
- Filename - Use a VIRIN for the file name. Make sure the VIRIN used for the filename matches the VIRIN used in the file. See the instructions below for how to create a VIRIN.

If recorded as a JPG: do not perform any colour corrections. Do not change the file size, the image size, or the resolution. Do not crop the images.

2. Filling Out IPTC Content.

The IPTC is a consortium of the world’s major news agencies and news industry vendors. It develops and maintains technical standards for improved news exchange that are used by virtually every major news organization in the world.

Since the late 1970s IPTC’s activities have primarily focused on developing and publishing industry standards for the exchange of news data. In particular, the IPTC defined a set of standards necessary to link the text information describing an image and embedding that information into the digital image file itself.

NATO Imagery Staff are required to add IPTC metadata to all of their image files. This ensures that all NATO imagery can be used accurately by the media and internally within NATO organizations. Images are to be ‘captioned’ using a standard template that ensures industry compliance across this diverse network and allows quick retrieval and identification, regardless of the system they are stored on.

Users can use any software for captioning their images but software such as Adobe Photoshop and Photo Mechanic support the metadata template and are recommended for use.
Alternative examples of commercially available IPTC compliant software are MediaGrid, iView Media Pro, Fotostation and Extensis Portfolio. If imagery staff chooses an alternative software program they are to ensure that compliance with the IPTC template is still maintained.

3. **Creating a VIRIN.**

All imagery must include a VIRIN. VIRINs uniquely identify every image shot by military photographers by using four pieces of information:

- the date the image was shot;
- the nationality and service of the photographer;
- identification of the photographer;
- a sequence number;

Here is an example: 071106-GBRA-8540B-001.

The components of the VIRIN are:

- 071106 - Date the image was shot (in YYMMDD format).
- GBRA - Photographer's nationality (using standard NATO three letter nationality abbreviations) and branch of service (i.e., use A-Army, F-Air Force, M-Marine, N-Navy, G-Coast Guard).
- 8540 - Last four digits of the photographer's military ID number or Social Security Number.
- B - First letter of the photographer's last (family) name.
- 001 - Sequence number for that day (sequence numbers start at 001 each day, not each shoot).

The same VIRIN should be used both in the IPTC header (captioning/metadata area of the image) and as the name of the file.

4. **Caption Content.**

The caption block should contain only two items: the caption and the credit line.

a. When constructing a caption:

- Include the full name, rank, and title of the person or persons featured in the photo. Include the full name and model number of all featured equipment, vehicles, aircraft, or ships.

Note: Some nations do not permit the release of personal details where this is the case this detail will have to be omitted – substitute generic information e.g. ‘a soldier from the XXX army’.
• Clearly identify the activity being documented. Include the date and place the image was shot.

• Briefly explain the purpose of the event, exercise or operation. Why the documented action is happening and/or why it is significant.

• Use acronyms sparingly. Do not use an acronym for a term appearing only one time within the caption. Be certain to define the acronym the first time it is used. This includes military units. For example, do not use ‘1 PARA’; use ‘1st Battalion, The Parachute Regiment’.

• Before you cut and paste text from word processing programs into either Photoshop or PhotoMechanic, turn off the ‘smart quote’ function within the word processing program. This will prevent the appearance of odd characters in the text when a Web browser presents the caption.

b. When constructing a credit line:

• Include the rank, full name of the photographer, nationality (using NATO standard 3 letter country abbreviations) and service as well as the release status of the image.

5. **Releasing Images.**

Images that are not released should not be transmitted or stored in a (public) archive. However if there is a need to include release data or a line ‘Not (yet) Released’, this is a function of the Instructions IPTC header. A line ‘Not Released’ or a line saying ‘Released by:’ (followed by name, rank, unit and contact information) could be included in the instructions but release information if applicable should be included in the property release header. Since the property release header is not a standard function however and not accessible through either Photoshop or Photo Mechanic release information should only be included in unique situations where the photo is distributed without being released. If released by NATO, SHAPE or another nation, there is no need to include release data beyond the source and credit information. If it is cleared for internal use only this could be included in the instructions header but such imagery should not be distributed on a public network. IPTC data is a function primarily used by professionals only, and ANY information distributed through it, including release and copyright information will probably not be picked up by the average user.

6. **Examples of properly constructed captions and credit lines:**


Credit: U.S. Navy photo by Photographer's Mate Airman Joshua T. Rodriguez

(Released)
Iraqi army soldiers salute as they graduate from basic training during a ceremony at the regional training centre on Camp Habbaniyah, Iraq, April 30, 2006. The soldiers are part of the first all-Sunni class to graduate.

Photographer: Gunnery Sergeant Sean D. McCullough USA M

(Released)

7. Keywords and Keywording.

Keywords are key ideas/concepts expressed as words.

Keywording is the practice of selecting the most appropriate keywords to describe an object, image, or work.

a. The Function of Keywords.

When researchers submit research papers for publication in a journal, the paper's abstract is typically preceded by a set of keywords. Generating these keywords is fairly simple as the work is usually focused and has a point of view (generally to prove or disprove a hypothesis).

b. When writing keywords, keep in mind the following:

- In larger online systems, the captions are fully searchable as well, so do not create keywords for every word in the caption, stick to what is important.

- Use plural spelling only, unless the spelling is different than just adding an ‘s’. For example, just using ‘cats’ is sufficient, but if you use ‘babies’ also include ‘baby’.

- Use gerunds not verbs. For example, use ‘running’, not ‘run’.

- Do not capitalize unless it is the name of a place or a proper noun (most search functions/search engines are NOT case sensitive, but this makes for easier reading).

- List alternative spellings for international audiences (color / colour, gray / grey, etc.).

- In order to copy and paste into the keyword field in Photoshop CS, use a comma and then a space between each term. For example: xxxx, xxx xxxx, xxxxx, term, word phrase, two word phrase, etc. You can also separate terms using a semi-colon or even a hard carriage return.
• Limit keywords to those that express or describe the visual content of the image. Do keyword thoroughly, but be judicious. Keywords for minor details, such as those out of focus or in the distance, should not be included.

• Apply keywords consistently. If ‘windsurfing’ should alternatively be keyworded as ‘wind surfing’, then ALL of your windsurfing / wind surfing images should contain both versions of the word.

• Do not apply human attributes and emotions to images of animals. For example, ‘love’, ‘smiling’ and ‘happy’ are fine if they are used with images of humans, but ‘smiling dog’ is likely to confuse a researcher.

8. NAA\textsuperscript{27}/IPTC Header Codes:

a. Descriptive Metadata:

• **Headline**: a brief summary of the contents of the image. The headline term should not be confused with the image title.

• **Description/Caption**: prose to comprehensively describe the who, what, when, where and why of the image.

• **Keywords**: keywords to express the subject of the content in free text. Keywords should include no new information but be used to find the images in a general search. They should include alternative spellings, genre, predominant colour, emotive keywords, etc.

• **Subject News Codes/IPTC Subject Code**: this field can be used to specify and categorise the content of a photograph by using one or more subjects as listed in the IPTC ‘Subject News Code’ taxonomy (available at [http://www.newscodes.org/](http://www.newscodes.org/)). Each subject is represented as an 8-digit numerical string in an unordered list. Only subjects from a controlled vocabulary should be used in this field; free-choice text should be entered into the Keyword field. When using the fields genre, scene, subject code and subject qualifier only use News Codes or controlled vocabulary. For the News Codes see the link above.

• **Genre**: see Subject News codes above.

• **Scene**: see Subject News codes above.

• **Subject Qualifier**: see Subject News codes above.

• **Category**: the category field lists codes that aid in a more detailed search. (See below).

• **Supplemental Categories**: the Supplemental Categories field lists codes that aid in a more detailed search for an object.

\textsuperscript{27} Newspaper Association of America.
b. Administrative Metadata:

It includes the following:

- **Title**: a shorthand reference for the image or photo – primarily for identification and less formal than the unique ID. The title of an image may take several forms; for photographers, this might be the filename of their original scan or digital camera file. *Do not confuse with the title field in Photo Mechanic; this refers to the creator/author title field.*

- **Date**: records the date (and optionally the time) when the image was taken, not the date when scanned, imported, archived or edited.

- **City**: where the image was originally taken. Do not use the transmission point city.

- **Country**: lists the three-letter country code where the image was originally taken.

- **State**: lists the state/province where the image was originally taken. For the United States, use official US state abbreviations.

- **Job ID**: identifier for the purpose of improved workflow handling. This ID should have no significance for archiving.

- **Instructions**: any of a number of instructions from the provider or creator to the receiver of the image not covered by other explicit fields. May cover embargoes, instructions for reproduction, etc.

- **Description/Caption Writer**: name of the person(s) involved in writing, editing or correcting the caption or other metadata of the image.

c. IPTC Contact Field.

The IPTC contact field is an option you can use to include the data potential users might need to contact you. You should include contact details for the PA office producing the images.

- **Creator**: this field should contain your name, or the name of the person who created the photograph. If it is not appropriate to add the name of the photographer (for example, if the identity of the photographer needs to be protected) the name of a company or organisation can also be used. Once saved, this field should not be changed by anyone. This field does not support the use of commas or semi-colons as separators.

  Note: This field is ‘shared’ with the ‘Author’ field in the Description Panel of the Adobe Photoshop File Info field.

- **Creator’s Job Title**: this field should contain the job title of the photographer. Examples might include titles such as Staff Photographer, Freelance Photographer, or Independent Commercial
Photographer. Since this is a qualifier for the Creator field, the Creator field must also be filled out.

Note: This field is ‘shared’ with the ‘Author Title’ field in the Description Panel of the Adobe Photoshop File Info field (only appears in versions of Adobe products later than CS).

- **Address (Contact Info):** the address field is a multi-line field. Enter your organisation name and all required information to locate the building or postbox to which mail should be sent.
- **City (Contact Info):** enter the name of the city in which your organisation is located.
- **State/Province (Contact Info):** enter the name of the State or Province in which your organisation is located. Since the abbreviation for a State or Province may be unknown to those viewing your metadata internationally, consider using the full spelling of the name.
- **Postal Code (Contact Info):** enter the local postal code (such as ZIP code) in which your organisation is located.
- **Country (Contact Info):** enter the name of the country in which your organisation is located.
- **Phone(s) (Contact Info):** enter your business or work telephone number here. Multiple numbers can be given; separate them with a comma. Be sure to include the complete international format of a phone number which is:
  
  `{country code} ({regional code}) {phone number} - {extension if required}` e.g. +1 (212) 1234578
- **Email(s) (Contact Info):** enter your organisation or work email address. Multiple email addresses can be given; separate them with a comma.
- **Website(s) (Contact Info):** enter the URL or web address for your organisation. Multiple addresses can be given; separate them with a comma.

### d. Rights Metadata:

- **Creator/Photographer:** this should preferably be the person who created the image. If this is not appropriate then the name of an organization or company should be used here.
- **Creator Job Title:** the job title of the photographer, such as ‘Staff Photographer’, ‘Freelance Photographer’ or ‘Independent Commercial Photographer’. See below.
- **Credit Line:** one or more parties to be credited for the image, shown in a single line adjacent to an image. Essentially free text, this line may follow formatting and style guides as required by law or organisation policy. Can be creator and service or service; i.e. ACO Photographic, NATO, Sgt Francois De Verre FRA A.
• **Copyright Notice:** these images are copyright NATO and may be used freely within the limitations described in the usage rights provided NATO is credited.

• **Property Release:** see above.

• **Usage Rights:** the usage rights field should include text instructions on how the image can be legally used. ACO standard terms are: "Images may not be reproduced for profit, used in advertising or in parodies or products that defame NATO nations".

• **Provider/Source:** who provided the image to the receiver? This doesn't have to be the owner/creator.

• **Urgency:** lists urgency name or code such as Low, Medium, High, Flash (only when official Flash clearance has been given and proper protocols for transmission and receiving are used), or a numeric code 1-8 where 1 is highest (Flash) 5 is normal and 8 is lowest. Numeric code 9 is user defined.

e. Imagery Categories.

The following imagery categories will be used for IPTC metadata:

• **News/Actuality.**

• **Culture & Entertainment.**

• **Anniversary.**

• **Feature.**

• **History (only scanned historic material).**

• **Interview (including Hometown stories).**

• **News Release.**

• **Protocol.**

• **Sports.**

• **Background (background and stock imagery).**

f. **Byline/Creator Titles:**

• **STF:** photographs by staff photographers.

• **FRL:** photographs made by freelance photographers.

• **MAG:** photographs provided by magazines.

• **POOL:** photographs made by pool photographers.

• **HO:** handout photographs.
g. Supplemental Categories:

<table>
<thead>
<tr>
<th>General</th>
<th>Sports</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMY Ceremonial</td>
<td>AFB American Football</td>
</tr>
<tr>
<td>ENT Entertainment</td>
<td>BBI (International) Baseball</td>
</tr>
<tr>
<td>EQP Equipment (tanks, planes, etc.)</td>
<td>BKI (International) Basketball</td>
</tr>
<tr>
<td>ETH Ethnic and local portraits/groups</td>
<td>BOW Bowling</td>
</tr>
<tr>
<td>EXC Exercises</td>
<td>BOX Boxing</td>
</tr>
<tr>
<td>FEA Non-news feature pictures</td>
<td>CAR Racing (car,boat, bike)</td>
</tr>
<tr>
<td>FILE File or stock photo</td>
<td>DRT Darts</td>
</tr>
<tr>
<td></td>
<td>EQN Equestrian Sports</td>
</tr>
<tr>
<td></td>
<td>FHK Field Hockey</td>
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<tr>
<td></td>
<td>GLF Golf</td>
</tr>
<tr>
<td></td>
<td>GYM Gymnastics</td>
</tr>
<tr>
<td></td>
<td>IHK Ice Hockey</td>
</tr>
<tr>
<td></td>
<td>OLY Olympics</td>
</tr>
<tr>
<td></td>
<td>RAC Racing (animals)</td>
</tr>
<tr>
<td></td>
<td>RUN Track and Field</td>
</tr>
<tr>
<td></td>
<td>SKI Skiing</td>
</tr>
<tr>
<td></td>
<td>SOC Soccer/Football</td>
</tr>
<tr>
<td></td>
<td>SWM Swimming</td>
</tr>
<tr>
<td></td>
<td>TEN Tennis and Racket Sports</td>
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h. Field Limits:

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</thead>
<tbody>
<tr>
<td>Caption</td>
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<tr>
<td>Keywords</td>
<td>64 per keyword</td>
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<tr>
<td>Credit</td>
<td>32</td>
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</tr>
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<td>Created Date</td>
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<tr>
<td>Province or State</td>
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<tr>
<td>Country</td>
<td>64</td>
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<td>Special Instructions</td>
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<tr>
<td>Category</td>
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<td>Supplemental Category</td>
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<td>32</td>
</tr>
<tr>
<td>Priority</td>
<td>None</td>
</tr>
</tbody>
</table>

9. Example IPTC Template.

A typical example of required IPTC data for a still image can be found below. The IPTC data was completed in PhotoMechanic software. Although not identical in IPTC data field appearance, all data fields will be available in any IPTC compliant software.
Annex 9-B  Tips for Taking Good Photos

A photographer should seek out the opportunities that will enhance the image of NATO using experience and creativity to find innovative solutions for their work. The adage a ‘picture paints a thousand words’ is certainly true. Remember it is the picture that will sell the story.

Composition makes the difference between a boring photo and an interesting one.

You want the viewer to feel what the serviceperson is feeling and experiencing. If you’re shooting winter warfare, replenishments at sea or flying operations reflect the weather in your images. If the service people are cold and uncomfortable you want to make your viewers feel cold and uncomfortable, or hot and sweaty and tired, happy or sad. Show the tears, the pain, and the emotion. Show people working on the equipment they use rather than just showing the equipment. Try to explain the story in your image.

You’re a fly on the wall. While you do not want to be part of the action, get in your subject’s face. Get as close as possible to the action with your lens. Zooms don’t always work. Zooms from far away don’t always get you the up close feel. Zoom in on a soldier’s tears from a respectful distance, but move in close while shooting soldiers crawling through the bush. If they are on the ground, get on the ground. The lens should be at the same level as the action. If it’s not, give an angle that is totally different. Shoot from overhead or from under the action if possible and safe to do so. A standard shot is the primary image and must be taken first as this may be the only shot to be taken given time constraints. Creative images should only be taken once a standard safety shot is in the bag. Be creative—having all your photos at eye-level, standing up is boring!

Remember to incorporate a relevant background to the image i.e. a ship/aircraft/tank/flag in the background. Flags are good props if nothing else is available but you must ensure that the flag is correct for the subject and it is recognizable as a flag.

When taking photographs you must remember to communicate with the subject to achieve a good expression and to avoid images where the eyes look like rabbits caught in the headlights or are closed.

Images should be downloaded and archived as soon as possible with the correct file information embedded within the image (see Annex 9-A to this chapter).

Practice using your camera’s motor drive. Take lots of photos. Film (memory) is cheap. You will have a better selection from which to choose. Avoid taking only one photo of your subject to avoid having that ‘great’ shot with the subject’s eyes closed. Same goes when taking group shots.

Always take photos at the highest resolution you can, preferably 300 dpi (dots per inch) and using a RGB colour profile. A high resolution photo can be reduced to low resolution for a website, but a 72 dpi photo cannot be increased to be of suitable quality for publication or to be shown in a slide-video presentation on a large TV screen.
Use natural light as much as possible, for interior shots as well as exterior shots. The use of a flash will be very useful in both areas for killing shadows. Use your flash to fill the subject not flood the subject with artificial light.

Action/Reaction. Capture the action and capture the reaction to the action. Photograph the soldiers on parade. And then photograph the baby waving to his father on parade.

When you take a photo, decide:

- What to include.
- When to press the shutter release button.

Decide where you want the horizon to appear. The most used position for the horizon is a third of the way down a photo. However, the subject and the required backdrop will govern the position of horizon. Do you want to include reference to the ground? Do you need to show rolling seas or a grey sky? Do you need to be above the subject to show the mud surrounding an infantry assault, or the sky/water option as a platoon crosses a river?

Take verticals and horizontals. Shoot faces. The rule of thumb is that faces should be at least as big as a 0.50 Euro coin per the size of print in this case looking at an output of 12x 8 inches. It is to enable identification of human features. Sometimes the subject can be smaller within the frame to show their surroundings. Alternately the image may show a close up of the individual, the face being effectively the majority of subject matter within an image. Think Don McCullin’s image of the shell shocked Marine in Vietnam. Does eye contact make or ruin the shot? For example, is the subject running towards you or turned to face you when a group of runners pass you?

A busy or overwhelming background can ruin a photo, while a background that complements the subject creates a stronger photo. When considering the background, watch for these three distractions:

- Objects – lampposts, branches or anything else blocking or appearing to protrude from the subject.
- Competitive backgrounds – a general confusion or jumble.
- Intrusive light or colour.

To reduce or remove these distractions:

- Change your camera angle.
- Change your position.
- Change your subject’s position.
- Eliminate some of the background by tightening up on your subject.
- Use a neutral background.
Constructive use of the foreground is an important composition tool. It balances, emphasizes and tells more about the subject. The proper use of the foreground gives an impression of depth and scale to the photo. The foreground can also be used to frame the subject. Sometimes the foreground will dominate the photo. Three ways to correct this include:

- Change the camera position – walk towards the subject if necessary.
- Use an alternative focal length.
- Reduce the depth of field.

Decide where you want the subject to be. To produce a balanced composition, use the rule of thirds. Imagine that the scene is divided into horizontal and vertical thirds. The intersections of the lines produce four ideal points to position your subject.

If you want your subject centred, position the most important part of your subject just above the centre of the image.

A well-exposed photograph produces a superior quality picture. So if you are comfortable with the basics, experiment with exposure. The results are sometimes surprising and help create a mood or underline something you want to show.

A good photograph always needs a description of what the image is: the people or equipment in the photograph. These descriptions are called photo cutlines and photo captions.

A cutline is usually a stand-alone statement that accompanies a photo when it is released to the media on its own without an accompanying article. It contains the five Ws (Who? What? When? Where? Why?) and sometimes the two Hs (How? How Much (the cost)?). There are a few basic guidelines on how to write photo cutlines:

- Always write in the present tense.
- Identify the action. Say what is happening in the picture.
- Name people who can be identified in the picture, usually from left to right.
- Identify the location.

A caption is the written material that goes with photographic material used to support news stories or feature articles. Depending on the photos you select, captions can simply identify the equipment, people, or specific actions being depicted. Sometimes they are only short quotations from the text of the story. Photo captions can be brief, since the bulk of the information the reader needs to understand the picture should appear in the text of the story.

If you are using Adobe Photoshop™ use the ‘File Info’ function to insert your photo caption. That way you’ll always have your photo caption if you can’t find the article that went with the photo.
In this package there are examples of good photos in a variety of situations to be used to guide you when taking images. Some of these photos have been cropped\textsuperscript{28} to show you how a tight photo draws the eye into the picture.

Taking good photos can be a lot of work until you are comfortable with your equipment and what it can do for you. So practice when you can. And don’t forget to have fun—because taking good photos can also be a lot fun!

These examples depicting people at work demonstrate interesting composition, relevant backgrounds and images that tell a story. These are the kinds of images that ACO imagery sections should be producing, including in news or photo story release, posting on their own Internet and Intranet sites, using in their publications and other PA products.

\textsuperscript{28} ‘Cropping’ is the photo industry term for removing extra space around the subject in a photo to focus the viewer’s eye on the subject. The space is removed using digital editing software. Note that there is no alteration or manipulation of the image itself.
Members of the Force Protection Company interact with Afghan children during a dismounted patrol in Kandahar City.

The Kandahar Provincial Reconstruction Team (KPRT) consists of Canadian Forces members, a civilian police contingent led by the Royal Canadian Mounted Police, Correctional Services Canada, representatives of the Department of Foreign Affairs and International Trade and the Canadian International Development Agency. The KPRT conducts coordinated interdepartmental operations to promote good governance, assists the Government of Afghanistan in extending its authority in the province of Kandahar, and facilitates the development of a stable, secure and self-sustaining environment for the people of Afghanistan.

Joint Task Force (Afghanistan), Rotation 4, is comprised of 2,500 Canadian Forces personnel drawn mainly from elements of the 5th Canadian Mechanized Brigade-Group in Valcartier, Quebec. The Force, lead by Brigadier-General Guy Laroche, is serving in the Province of Kandahar, Afghanistan, as part of the International Security Assistance Force (ISAF). Canadian soldiers play a key role in the NATO-led mission whose goal is to improve the security situation in Afghanistan and assist in rebuilding the country.

Canada is in Afghanistan at the request of the United Nations on behalf of the democratically elected Afghan government, alongside with 36 other nations. This UN-sanctioned mission mandated the NATO to help building a stable, democratic, and self-sufficient society in Afghanistan.

(Canadian Forces photo by Corporal Dan Pop) (Released)
Kandahar Provincial Reconstruction Team Image Technician
Annex 9-D ACO Video Guidelines

1. Video Formats.

We appreciate that NATO member nations capture their video imagery using various broadcast and camera formats. Broadcast formats may include PAL or NTSC using 16:9 widescreen aspect ratio formats. Camera formats vary greatly and are further complicated by the many new High Definition (HD) formats that have been released.

It is preferred that any one of the following formats listed below be used:

- HD, compression H264, .mp4 or .mov files is acceptable and will be used for web release, but a 4:2:2 compression is preferred for archives.
- Footage can be shot in either PAL or NTSC.
- 16:9 widescreen pixel aspect ratio.

2. All video imagery submitted DVIDS must include:

a. Video Slate.

All video sequences should include a slate at the front of the sequence that contains at a minimum the following:

- VIRIN.
- Videographer Name and Rank.
- Videographer Contact Information (e-mail and/or phone).

VIRINs uniquely identify every piece of video shot by military videographers by using four pieces of information: the date the imagery was shot, the country (using NATO standard three-letter abbreviation), service of the videographer, identification of the videographer, and a sequence number.

The components of the VIRIN are described in paragraph 3 of Annex 9-A. A sub-sequence number (starting – 001) can be used only if a sequence needs to be split into smaller pieces for transmission.

The VIRIN of the video sequence should be used as the filename of the electronic version(s) of the sequence and as the filename of the corresponding shot sheet. Naming each file with the VIRIN ensures shot sheets and sequences remain together when arriving at the ACO Imagery Section.

The placement of a slate on the video sequence does not replace the requirement to send a caption sheet with the video.

b. Captioning.

All video needs to be correctly captioned on a separate document and
transmitted along with the video file or embedded on the video if the editing software allows it. Include a detailed ‘Sequence Caption’ describing the footage followed by ‘Shot Captions’ of the video sequence (include information that is pertinent only to the section of time code).

(1) Sequence Caption.

The following detailed Sequence Caption information should be included:

- VIRIN.
- Classification of the video.
- Videographers name, nationality, unit and contact details (both telephone and email).
- Description of the video sequence, including the full name, rank, and title of the person or people featured. Include the full name and model number of all featured equipment, vehicles, aircraft, or ships. If not featured in the entire video sequence, place information about people, equipment, vehicles, aircraft and ships in the shot captions.
- Clearly identify the activity being documented. Include the date and place the video was shot.
- Briefly explain the purpose of the event, exercise or operation. Why is the documented action happening and/or why is it significant?
- Use acronyms sparingly. Do not use an acronym for a term appearing only one time within the caption. Be certain to define the acronym the first time it is used. This includes military units. For example, do not use ‘1/14 Infantry’; use ‘1st Battalion, 14th Infantry Regiment’.

Sequence Caption examples:

060515-GBRA-8540B-001
Cleared for Public Release
Corporal David Brown, GBRA, ACO SHAPE PAO, +32 1234 567891
david.brown@shape.nato.int


060515-GBRA-8540B-001
Cleared for Public Release
Corporal David Brown, GBRA, ACO SHAPE PAO, +32 1234 567891
david.brown@shape.nato.int
Afghan National Army soldiers graduate from basic training during a ceremony at the regional training centre at Camp Whatever, Afghanistan, April 30, 2006. The soldiers are part of the first class to graduate before being assigned to the newly formed 250th Corps.

(2) Shot Captions.

A shot-by-shot caption should include information that is pertinent only to the section of time code. If applicable to the entire sequence, place the information in the Sequence Caption. Place timecode in Hour:Minute:Second:Frame format.

Shot Caption Examples:

<table>
<thead>
<tr>
<th>Timecode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>00:02:01:14</td>
<td>MS - Col. John Smith presents diploma to Pvt. Joe Dean</td>
</tr>
<tr>
<td>00:02:08:05</td>
<td>MS - Col. John Smith presents diploma to Pvt. Frank Bazooka</td>
</tr>
<tr>
<td>00:02:15:22</td>
<td>LS - Graduates march in review</td>
</tr>
</tbody>
</table>
Annex 9-E  Digital Video and Imagery Distribution System

The ACO DVIDS structure comprises a top level page for ACO which is supplied with content from the pages which are managed by SHAPE and the JFC’s/major operational commands.

When issuing a press release including a link to the appropriate page will allow media outlets to access the image and associated captions, etc. See example below:
The DVIDS website has various links to both handbooks and instructional videos. To be able to use most of these instructions, the operator must register with DVIDS. Registration for all PAOs is highly recommended.

Useful links within the user, password protected site are:
For uploading New Items:
http://www.dvidshub.net/training/upload_news_photos.pdf

For uploading Audio:
http://www.dvidshub.net/training/upload_audio.pdf

For uploading Publications:
http://www.dvidshub.net/training/upload_publications.pdf

For uploading Photos:
http://www.dvidshub.net/training/upload_photos.pdf

For using DVIDS Delivery:
http://www.dvidshub.net/training/DVIDSDeliverySOPV2.doc
For uploading using FTP:
http://www.dvidshub.net/training/DVIDSDeliveryFTPClientSOP.doc

A host of instructional videos can be found at:
http://www.dvidshub.net/?script=admin/admin_training.php&view=tools

DVIDS ‘Smartbook’ Website:
http://www.dvidshub.net/training/dvids_smartbook.pdf?bcsi_scan_175338BB3A9A8BC0=0&bcsi_scan_filename=dvids_smartbook.pdf
Annex 9-F  The Hometowner / Home Town Stories

The hometowner is a form of applied journalism peculiar to military PA. It is a cutline, usually accompanied by a photograph, depicting a military member of NATO or a NATO civilian employee at work. These are usually sent to community newspapers in the hometown of the person featured in a news release.

Hometowners are an excellent way to reach the public with messages about NATO, since they feature people whom the local readers know. There is then a local angle and local interest in an event that might otherwise not have been covered by the hometown daily or community newspapers.

Hometowners are most effective when they originate from operational deployments, field exercises, special events, or foreign locations. This gives them enough newsworthiness for editors to use them without compromising their journalistic principles. The standard hometowner should not be more than 150 words. Since it is actually a more detailed photo cutline, the cutline rules apply. A typical hometowner might read as follows:

"Private John Hampton, 23, of ‘C’ Company, 1st Battalion, Princess Patricia’s Canadian Light Infantry, checks his gear before boarding a CC-130 Hercules transport aircraft for a night parachute jump over Canadian Forces Base Wainwright, Alberta. Hampton is one of 5,000 Canadian and British soldiers taking part in Exercise Prairie Oyster, part of the annual NATO land forces joint training program."

Hometowners use first names and ages. They also blend personal information with information about operations, policies, and activities. In this case, the public receives information about the exercise, while the subject of the hometowner receives recognition for his efforts. It is good practice to provide the subject with a complimentary copy of the photograph. It is also important to obtain permission from the individual for the production of a hometowner.
Chapter 10

Social Media and Internet-based Communications

“In recent years the power of social media has grown exponentially. Instantly connecting people around the world to ongoing events, this medium has dramatically increased the speed and impact of communication. Our recent history has repeatedly shown us how critical it is for us to engage here early and accurately to inform, but more importantly to hear from and respond to our many publics across the services and around the world. We have to be present where the conversation is taking place and right now it’s taking place on social media.”

– General Philip Breedlove – Supreme Allied Commander Europe

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10.1. Introduction.

a. The Internet is a powerful tool allowing commanders to communicate directly with audiences and without filters. It therefore must be factored into PA activities using the same basic thinking process applied to other communications channels and products. Before developing an internet site, whether it is a conventional web site or social media site, a clear understanding should be established as to who the target audience is and what PA objectives it will support.

b. ACO Directive 95-3, attached as Enclosure A.6, sets social media policy. This document should be consulted before engaging in social media activities and local SOPs and policies should be consistent with it.

10.2. Planning Considerations. The following questions aid in determining the best use of a website:

a. What do we want to achieve with our site?

b. Which objectives can we meet using the Internet?

c. Is there a strategic advantage to using the Internet for the objectives?
d. Are there any disadvantages to using the Internet?

e. Who are the selected audiences we are trying to reach?

f. What are the communications needs?

g. Where do the needs of the audience coincide with our objectives?

h. When planning for operations, do key audiences have access to the Internet? Which ones do not have access to the Internet? Are they Internet users? Do third-party messengers have access to the Internet?

10.3. Responsibilities and Risks.

Prior to the initial stand-up of an ACO web site, careful planning must occur to ensure the site can be properly supported and is adequately protected. Sites may be hosted on NATO infrastructure, through NCI Agency\(^{29}\) and NCIRC\(^{30}\), or on a suitable commercial hosting site. Security advice should be sought from appropriate authorities regarding risks but should not proscribe a particular solution as the same risks are faced wherever the site is hosted; the key issue is how they are managed or mitigated and the risk/benefit assessment. Ultimately, the acceptable level of risk is a command decision but that decision should be properly informed. The main issues which need to be considered are:

a. Denial of service attack (risk to reputation and availability of the site).

b. Hacking and defacement or infection (risk to reputation and operability).

c. Inadvertent uploading of classified material.

d. Potential for embedded metadata to be aggregated thereby revealing information about the source system.

e. Inappropriate discussions or content introduction (risk to reputation).

f. Old/outdated information (risk to credibility).

10.4. Appearance and Content.

a. ACO PAOs are responsible for content management and the appearance of their respective Internet websites. Posting information on the Internet for public access is the same as releasing information through any other means. Clear approval procedures must be established for the release of information.

\(^{29}\) NATO Communications and Information Agency.

\(^{30}\) NATO Computer Incident Response Capability.
b. ACO websites need to be current, easily navigable, visually appealing, interactive, and consistent with the NATO Visual Identity Guidelines. A good general guideline for websites development is ‘the three click rule’. If a user has to click more than three times to find the desired content, he will lose patience and look elsewhere.

c. ACO websites should not duplicate content from other NATO websites but may use extracts to attract attention to an issue and then link to the original.

d. Images posted to ACO websites should be carefully selected to support a narrative and should be compliant with the ACO Visual Identity Guidelines as specified in Enclosure D.

e. PAOs must work closely with the technical staff at the JFC/CC/mission that is responsible for technical requirements and maintenance of their respective web sites. It is the PAO, however, acting on behalf of the Commander that determines JFC/CC/mission website content.

f. All personnel working in ACO are encouraged to submit content for posting on ACO websites, however, content must be approved for release by the JFC/CC/mission CPAO.

g. The information on ACO websites is there for the public, including national institutions, journalists or researchers on ACO activities. Therefore, within OPSEC and privacy sensitivities, ACO web sites should contain as a minimum the information listed below:

- PA Contact Information (phone number, fax number and e-mail address);
- news Releases, Fact Sheets and Backgrounders;
- biographies of key personnel assigned to each JFC/CC/mission;
- information about current operations;
- information about current exercises;
- information about the HQ (facilities, community life, etc.);
- photo galleries with high and low resolution images for media publication;
- links to other sites (i.e. NATO HQ, ACO/ACT HQs, MoDs of NATO countries, International Organisations, Military Institutions, etc.); and
- archived information.

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31 Assigned web content managers post news as quick as is practical for maintaining a current website.
10.5. **Blogs and Other Internet Communications.**

a. Internet home pages, message boards, Web Logs (blogs), Web-based Video Diaries (VLogs) and other Internet video products, standard email, text messaging and other evolving forms of electronic media have become increasingly popular as a convenient means for military members to communicate in real and near-real time with families, friends and the general public – nationally and internationally.

b. The most prolific form of such media currently is the 'blog', which is a frequently updated web site highlighted by personal commentary, editorial comments, and regular links to supporting web sites. Often a personal journal, blog consists of dated entries in chronological order, and invites and/or permits comments from readers, thereby fostering two-way communication.

c. Blogs and other emerging forms of communication are proliferating on the Internet, though generally created for personal use; they are often used by advocacy groups or people with recognized or self-proclaimed expertise in a particular subject. Consequently, they have become significant sources of information for the traditional news media as well as the public at large.

10.6. **ACO Blog.** Provision has been made within the ACO web site, managed by SHAPE PAO, for ACO units to maintain a blog if they so wish. The site allows units to maintain their own blog page, accepting and responding to comments but also rolls up recent posts to an ACO blog page to provide an alternative view of what’s going on in ACO. In order to build and maintain an audience this site needs regular and diverse contributions therefore any ACO unit wishing to contribute is encouraged to do so, links on HQ web sites should be established pointing to the ACO blog or the units subpage if established.

a. The objectives of the blog are:

   - To communicate the Commander’s intent and philosophy.
   - To foster a sense of empowerment among staff and promote innovation and interaction.
   - To broaden and deepen understanding of ACO.
   - To engage with audiences so we can explain our mission, generate support and temper opposing views.
   - To solicit ideas that may help us develop our thinking and nurture third party advocates.

b. Bloggers are news reporters and value their audience share every bit as much as traditional media, so it is important to let them know why the ACO

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32 Three years old; older information should be archived by NATO HQ. Old and outdated information create a credibility risk to the website organisations. It is advisable to have links to the responsible entities instead of updating other entities information.
headquarters (SHAPE) website is a useful resource to provide to their readers. Bloggers are invited to visit www.aco.nato.int and www.act.nato.int, use any materials they find there, and subscribe to electronic publications and notifications.

c. The blog will also aid ACO’s existing online efforts by establishing links from popular blogs to the command’s existing official website that contains news releases, photos, audio, video and statements by key leaders.

10.7. Personal Blogs, Social Media and Operational Security.

a. MC 0457/2 gives broad policy guidance on personal Internet websites (‘blogs’), and the uploading of personal video and still imagery to commercial web sites. The approval authorities and guidelines respecting public electronic communications are no different than those for other forms of external communication.

b. Military and civilian personnel, especially when deployed or in situations where normal civilian communication channels are limited, often use blogs to communicate with family and friends. But blogs and other personal diaries, including video products, are open to review by anyone with World Wide Web access. Uninformed users often think of these mediums as tools for conversation amongst peers, but, because of the public nature of blogs, they are open to unlimited view and dissemination.

c. With the increased speed and capability of these digitized and wireless communications comes increased personal and military unit responsibility. As easily as personnel can text message, email, or post information to a blog, VLog or other evolving forms of electronic media or video invention, NATO’s adversaries can retrieve and monitor these sources. Information harvested here has the potential to make our adversaries much more lethal.

d. All ACO personnel must understand that whether classified or unclassified, the information to which they have access, including their very life style, is valuable to our adversaries.

e. OPSEC is paramount. It is incumbent upon all ACO personnel to consider the potential for creating risk to themselves, their families, their peers and the mission by publishing information to the Internet. Such information or imagery may, either individually or in conjunction with other information, provide expert analysts insight into ACO current operations, equipment, capabilities, tactics, and intentions, or may provide information that puts personnel in specialist roles or their families at risk.

f. All personnel assigned to ACO shall consult with their chain of command before publishing NATO-related information and imagery to the Internet. Both PAOs and intelligence staffs will review the information and imagery prior to release to ensure that it does not jeopardize NATO operations and personnel.
10.8. **Social Media Guidance.**

a. NATO provided information and communication systems are for official use and authorised purposes only. Authorised purposes may include limited personal use when permitted by commanders/commanding officers and supervisors for morale and welfare purposes, but, whether accessed at home or at work, OPSEC training and education apply to internet communications in exactly the same manner as to personal conversations, correspondence, telephone conversation, and interaction with the public and the media. ACO policies on communicating with unauthorised personnel apply just as strictly to electronic communication such as blogs. Always assume the entire world, adversaries included, is reading or intercepting your material – email, blog or personal web page, text message, or video transmission.

b. Personal websites and blogs produced in a personal capacity and not in connection with official duties or with NATO supplied equipment restricted from such use require no advance clearance. However, it is the personal responsibility of ACO personnel to ensure that any such electronic communication does not contain un-releasable information as defined in NATO OPSEC training and guidance.

c. Personnel should also consider adding a disclaimer to personal websites to preclude readers from assuming unofficial sites represent an official NATO/ACO position. Also be aware that any limitations on free speech imposed by national military authorities (for example, no political commentary while in uniform) remain extant when serving in NATO.

d. Personal websites and Social Media platforms should not contain product endorsements or inflammatory comments.

e. Preparation activities, as explained earlier, are not to be done during normal duty hours or with the use of ACO facilities, property, or personnel unless authorised to do so by their chain of command. The author is prohibited from using official ACO information generally not available to the public and which would not be released under NATO and ACO security policies.

f. The following is a summary of some of the types of information that must not be displayed on any public accessible web site including personal blogs or other electronic social media operated by ACO personnel or contract employees:

- pre-decisional information, proprietary information, business sensitive information, information designated as For Official Use Only;
- information that is not based on personal experience or not in the scope of personal duties;
- information — other than authorised news releases — about casualties prior to official confirmation that next of kin have been notified and some competent authority authorises publication of
specific casualty information. Commanders are reminded that casualty information is to be tightly controlled and heavily scrutinized;

- information — other than authorised news releases — regarding events or incidents currently under investigation;
- information that is under copyright or trademark, without permission of the holder;
- unit or other personnel lists/rosters, charts or directories, or the names, addresses and telephone numbers of unit members; and
- any image, still or motion, of any military operation or activity unless that image is personal and has been cleared for release by the proper authority.
Enclosure A.1  NATO StratCom Policy – PO(2009)0141

29 September 2009

To: Permanent Representatives (Council)
From: Deputy Secretary General

NATO STRATEGIC COMMUNICATIONS POLICY

1. I attach at Annex an agreed paper by the Senior Political Committee on a NATO Strategic Communications Policy. As you will recall, on 16 September 2009, the Council tasked the Senior Political Committee (SPC) and the Military Committee (MC) to send their recommendations on the draft Strategic Communications Policy paper (SG(2009)0794) to the Council within the following 2 weeks.

2. The SPC approved the Policy at Annex under silence on 28 September 2009. In addition, you will have seen MCM-0164-2009 in which the Military Committee endorses the Policy.

3. I intend to place this paper on the Agenda of the Council meeting scheduled for 30 September 2009 for your approval.

(Signed) Claudio Bisogniero

1 Annex

NATO UNCLASSIFIED
NATO UNCLASSIFIED

ANNEX to
PO (2009)0141

NATO STRATEGIC COMMUNICATIONS POLICY

1. Introduction

1.1 The Strasbourg / Kehl Summit declaration states that "it is increasingly important that the Alliance communicates in an appropriate, timely, accurate and responsive manner on its evolving roles, objectives and missions. Strategic Communications are an integral part of our efforts to achieve the Alliance’s political and military objectives". Dealing with today's information environment is part of the larger Public Diplomacy effort to engage with public opinions and their target groups in order to foster the support for, and understanding of, the Alliance in the medium and long term. NATO must use all relevant channels, including the traditional media, internet-based media and public engagement, to build awareness, understanding, and support for its decisions and operations. This requires a coherent institutional approach, a continuing coordination of effort with NATO nations and between all relevant actors, and consistency with agreed NATO policies, procedures and principles.

1.2 NATO Strategic Communications should be modern in technique and technology in order to match the information cycle; proactive; engaged with, and responsive to, public opinion at all levels, as appropriate; demonstrate consistency of messaging and the maximum possible transparency; in order to promote understanding and trust; and fully integrated in the development and execution of NATO's policies, operations and missions.

1.3 NATO's new Strategic Communications policy will enable the Organisation to:
   a. enhance coherence of its communications mechanisms, both civilian and military;
   b. communicate better with target audiences, as well as with other international actors and organisations;
   c. make best use of its resources.

It will be fully integrated in the development and execution of NATO's policies, operations and missions.

2. Aim

NATO Strategic Communications aim, as appropriate to circumstances and theatres, to:

a. contribute to general public awareness, understanding and support of NATO as part of a broader, ongoing public diplomacy effort;

   b. help build public awareness, understanding, and support for specific NATO policies, operations, and other activities in all relevant audiences. This will be done in close and lasting coordination with NATO member states, which
have their own national Strategic Communications responsibilities and programs with regard to NATO; and

c. contribute positively and directly in achieving the successful implementation of NATO operations, missions, and activities by incorporating Strategic Communications planning into all operational and policy planning.

3. Key principles

NATO Strategic Communications should adhere to the following principles:

a. Accuracy, clarity and timeliness;
b. consistency and coherence of message across all levels of command;
c. active engagement in the information environment, including public electronic communications, with an emphasis on speed and responsiveness;
d. ensuring credibility of NATO’s communications by fostering relationships of mutual trust with media representatives;
e. effectiveness that is, as far as possible, clearly defined, measured and reviewed;
f. multiplicity of efforts and maximum reach, engaging all of NATO communications capabilities and all available communications platforms to strengthen the dissemination of consistent messages;
g. soliciting public views and adapting efforts as necessary.

4. Definitions

4.1 NATO Strategic Communications: the coordinated and appropriate use of NATO communications activities and capabilities – Public Diplomacy, Public Affairs (PA), Military Public Affairs, Information Operations (InfoOps) and Psychological Operations (PSYOPS), as appropriate – in support of Alliance policies, operations and activities, and in order to advance NATO’s aims.

4.2 Public Diplomacy: NATO civilian communications and outreach efforts and tools responsible for promoting awareness of and building understanding and support for NATO’s policies, operations and activities, in the short, medium and long term, in complement to the national efforts of Allies.

4.3 Public Affairs (civilian): NATO civilian engagement through the media to inform the public of NATO policies, operations and activities in a timely, accurate, responsive, and proactive manner.

4.4 Military Public Affairs: is the function responsible for promoting NATO’s military aims and objectives to audiences in order to enhance awareness and understanding of military aspects of the Alliance. This includes planning and conducting media relations,

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1. Operational circumstances covered by MC 422/3 Information Operations and MC 402/1 PSYOPS remain valid.
internal communications, and community relations. Military Public Affairs at each level of command directly supports the commander and may therefore not be further delegated or subordinated to other staff functions.

4.5 Information Operations: a military function to provide advice and co-ordination of military information activities in order to create desired effects on the will, understanding, and capabilities of adversaries, potential adversaries and other parties approved by the NAC in support of Alliance operations, missions and objectives.

4.6 PSYOPS: Planned psychological activities using methods of communications and other means directed to approved audiences in order to influence perceptions, attitudes and behaviour, affecting the achievement of political and military objectives.

4.7 Public Affairs and Information Operations are separate but related functions. There shall be no personnel overlaps during operations of staff designated for Information Operations on the one hand, and Public Affairs officers on the other.

5. Roles and Authorities

5.1 North Atlantic Council (NAC): The North Atlantic Council provides overall guidance and direction to NATO Strategic Communications efforts, as well as mission-specific strategic and political guidance for NATO information activities. It keeps the implementation of the Strategic Communications policy under active review.

5.2 Secretary General (SG): The Secretary General provides specific direction and guidance on Strategic Communications to all NATO civilian and military bodies and commands on Alliance policy. The Secretary General is the principal spokesperson for the Alliance.

5.3 Military Committee (MC): The Military Committee provides overall policy for NATO military PA, InfoOps and PSYOPS, in accordance with political direction and decisions, and consensus military advice to the NAC on Strategic Communications issues.

5.4 Chairman of the Military Committee (CMC): The Chairman of the Military Committee is the principal military spokesperson for the Alliance on all military issues.

5.5 Supreme Allied Commander Europe (SACEUR): SACEUR provides direction and guidance on Strategic Communications within ACO, which includes military PA, InfoOps and PSYOPS, in accordance with the overall Strategic Communications direction from the NATO HQ\(^2\). SACEUR is the principal military spokesperson for current Alliance operations.

5.6 Supreme Allied Commander Transformation (SACT): SACT provides direction and guidance on Strategic Communications within ACT, provides Strategic Communications concept and capability development, in accordance with the overall

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\(^2\) The term "NATO HQ" indicates the authority of the NAC, the SG and the MC.
Strategic Communications direction from the NATO HQ, and in close coordination with ACO. SACT is the principal military spokesperson on NATO transformation.

5.7 Assistant Secretary General for Public Diplomacy (ASG PDD): The Assistant Secretary General for the Public Diplomacy Division oversees the coordination of all Strategic Communications activities across all NATO civilian and military bodies and commands, and also directs all public diplomacy activities (except press and media, which are directed by the NATO Spokesperson on behalf of the SG).

5.8 NATO Spokesperson: The NATO Spokesperson, on behalf of the SG, provides day-to-day direction of all Headquarters media activities, including messaging, and offers guidance to military PA to ensure that all NATO messages and communications are consistent with political direction and decisions.

5.9 International Military Staff (IMS) Public Affairs Advisor (PAA): IMS PAA provides spokespersonship for the MC, supports the MC, its Chairman, and the Director IMS on Strategic Communications issues. He facilitates interaction and coordination between the two Strategic Commands, the MC, and the Public Diplomacy Division (PDD) on military PA and Strategic Communications issues.

5.10 IMS Information Operations (InfoOps): the IMS Operation Division is responsible for MC policy on Information Operations and PSYOPS, and facilitates cooperation between NATO's two Strategic Commands and the MC on Information Operations and PSYOPS issues.

5.11 Supreme Headquarters Allied Powers Europe (SHAPE) Chief Strategic Communications (CSC): SHAPE CSC is responsible to SACEUR for the development and integration of Strategic Communications plans in support of NATO current operations and ACO activities, in accordance with the overall Strategic Communications direction from NATO HQ; for the coordination of military PA, InfoOps and PSYOPS outputs in support of these plans and outputs; for overseeing the execution of the plans, in coordination with NATO HQ and subordinate ACO HQs.

5.12 SHAPE Chief Public Affairs Officer (PAO): under SACEUR's direction, SHAPE Chief PAO directs, plans, and executes strategic level military PA in support of NATO current operations and ACO activities, in accordance with the overall Strategic Communications direction from NATO HQ.

5.13 SACT Chief Public Affairs Officer (PAO): under SACT’s direction, SACT Chief PAO directs, plans and executes strategic level military PA in support of ACT activities, in accordance with the overall Strategic Communications direction from NATO HQ.

6 Relationships

6.1 The following relationships will guide all levels of command to ensure compliance and coherence with the overall direction of Strategic Communications set by NATO HQ:
a. The NAC and SG direct all NATO Strategic Communications, civilian and military.

b. ASG PDD is responsible for overall coordination of NATO Strategic Communications, civilian and military, within the overall direction set by the NAC and the Secretary General. Within NATO HQ, ASG PDD ensures coherence with, and maximum effectiveness of, NATO’s Strategic Communications efforts. The ASG PDD is responsible for establishing and chairing a standing body that brings together the relevant elements of the information community, including SHAPE, SACT and the IMS, as well as representatives from other NATO divisions responsible for operations, planning, and partnerships. On behalf of the NAC, ASG PDD will provide guidance to, and oversee coordination of MC/IMS, SHAPE and SACT Strategic Communications.

c. SHAPE Strategic Communications and SACT Chief Public Information Officer (PIO) will ensure coherence with the overall NATO Strategic Communications effort in their area of responsibility.

d. NATO Strategic Communications aim, principles and considerations must be integrated in the work of both the IS and IMS, guided by policy and planning decisions, in order to provide timely and effective input to the planning and conduct of operations and activities.

e. Under leadership of ACT, Strategic Communications capability development, including training, must be closely coordinated with NATO HQ and ACO.

6.2 MC policies relevant to information disciplines (MC 457/1 Public Affairs, MC 422/3 Information Operations, MC 402/1 PsyOps) remain extant. The implementation of the Strategic Communications process will not affect command and control arrangements of these disciplines.

7. **Public Electronic Communications**

New means of public electronic communications offer NATO additional means of communicating its message in order to meet its objectives. However, the use of such communications presents some challenges. The authorities and guidelines governing public electronic communications are no different than those for other forms of external communications. In their use of such communications, the NATO civilian and military staffs must adhere to the provisions of security and propriety.

8. **Resources**

The NATO budgetary authorities will measure the resources — human, technical and financial, as appropriate — devoted to realising effective Strategic Communications and their development (including training resources). Resources for NATO communications will be contained within the approved budgets. An evaluation of the effectiveness of the communications and of the resources allocated to them will have to be provided regularly. This will enable performance to be measured, further progress identified and, if needed, resources to be re-allocated.
Enclosure A.2  NATO Military Committee PA Policy – MC 0457/2 (includes Corrigendum No 1)

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MC 0457/2

NATO MILITARY POLICY

ON

PUBLIC AFFAIRS

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NATO MILITARY POLICY ON PUBLIC AFFAIRS

GENERAL

1. The post-Cold War, post-9-11 era has been marked by NATO military operations of unprecedented scale, scope and complexity in locations far from the traditional Euro-Atlantic geographic area. In 1999, the Alliance counted 16 nations as members and none as partners; less than 20 years later, the number of member/partners had quadrupled to include almost one-third of the world’s nations, with further expectations of growth. In that same period, we have been witness to a burgeoning market for news in an increasingly competitive media environment combined with new information technologies including the Internet. The result of these developments is that almost any aspect of NATO operations and issues can or will be reported to global audiences in near-real time. NATO adversaries also have similar access to all these technologies and use them to impede their own information and messages to try and sway publics and influence Alliance policy.

2. National and international security issues now figure prominently on the domestic political and media scenes in most NATO countries. Developments respecting military operations or military forces undergoing transformation often feature in coverage and can even define or shape the national and international political discourse. Public expectations for more open and transparent organisations including greater financial accountability and propriety of government spending, plus competition in the labour market with the private sector for the same skilled, fit, intelligent recruits are relatively new phenomena. There is also recognition and acknowledgement that informing our own internal audiences makes for a more productive workforce and empowers our most important outreach resource. All of these various factors regularly test the depth, breadth and flexibility of the military public affairs function in NATO HQs and member nations.

3. In recent years, the political dynamic has evolved and the operational environment has changed. Public expectations regarding the timeliness, accuracy and type of information that should be available, fuelled by a 24/7 global media industry, and the rapid growth of the use of the Internet and social media, have changed dramatically and NATO needs to respond appropriately. Effective public affairs support to field and permanent HQ commanders is an integral part of that response and requires that the function be properly resourced and fully integrated into the decision-making process for military operations, policy development, program design and service delivery. As such, a capacity to manage and deliver public affairs programming is expected at all NATO military HQs.

4. Military Public Affairs (PA) is part of the wider NATO Strategic Communications (StratCom) effort which aims to enhance coherence of all information and communication activities and capabilities, both civilian and military. ¹

¹NATO Strategic Communications Policy defines NATO Strategic Communications as the coordinated and appropriate use of NATO communications activities and capabilities – Public Diplomacy, Public Affairs, Military Public Affairs, Info Ops and PsyOps – in support of Alliance policies, operations and activities, and in order to advance NATO’s aims. (PO(2009)/141, 29 Sep 09)

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AIM AND APPLICABILITY

5. This policy establishes direction respecting NATO military Public Affairs (PA) for all personnel working under NATO command. It also serves as guidance for all those in the NATO force structure or working in support of NATO military authorities.

MISSION

6. The mission of NATO military PA is to support commanders by communicating accurate information in a timely manner to audiences to improve public awareness and understanding of the military aspects of the Alliance’s role, aims, operations, missions, activities and issues, thereby enhancing organisational credibility. Audiences can be allied, international, regional, local or internal, depending on the issue or activity.

DEFINITION, FUNCTIONS AND PRINCIPLES

7. Definition. NATO military PA is the function responsible to promote NATO’s military aims and objectives to audiences in order to enhance awareness and understanding of military aspects of the Alliance. This includes planning and conducting external and internal communications, and community relations. Military PA at each level of command directly supports the commander and may not therefore be further delegated or subordinated to other staff functions.

8. Functions. The three basic functions of NATO military Public Affairs are:

   a. External Communications

      (1) Media Relations activities are designed to provide information through all mass communication means to NATO audiences. Commanders and staffs, through their PAOs, should be prepared to, for example: respond to media inquiries; issue statements; conduct briefings and interviews; arrange for access to permanent and operational units; and distribute information including imagery, all as a means to develop relations with the purveyors and the consumers of news.

      (2) Outreach activities are aimed at fostering strategic relations with key external stakeholders, who have an interest in military issues and activities, such as think-tanks, academia, military-related associations, and other non-news media entities. They are often invited to comment as unbiased subject matter experts in the field of security and defence policy, and more specifically on NATO policy, decisions and actions, and can therefore provide a sustainable “force multiplier” effect.
b. **Internal Communications** efforts facilitate communication with and among NATO military and civilian personnel and their families. Its purpose is to inform about the command or HQ, its people and its activities, and is distinct from administrative information or direction from the chain of command that is normally found in administrative or routine orders. Effective programs to keep internal audiences informed about significant developments that affect them and the work of their HQ creates an awareness of the organisation’s goals and activities, improves work quality, and makes command personnel more effective representatives of the organisation.

c. **Community Relations** programs are associated with the interaction between NATO military installations in NATO member states and their surrounding civilian communities. These programs can take the form of addressing issues of interest to and fostering relations with the general public, business, academia, military-related associations, and other non-news entities.

9. **Principles.** The principles of NATO military PA are:

a. **Tell and show the NATO story.** Military PA efforts support commanders and staff in the execution of their mission and are conducted in accordance with higher NATO political and military direction. Practitioners are first and foremost NATO military PA staff and they should develop and promulgate compelling narratives that support the Alliance’s military operational objectives.

b. **Provide accurate information in a timely manner.** This is critical to functional and organisational credibility with publics, internal audiences, and media, and helps deter adversary propaganda in a 24/7 media environment. The public affairs impact of the activity is often directly proportional to the timeliness and accuracy of the PA effort or response: the same information delivered quickly by NATO representatives can have a qualitatively different effect than the same information delivered a day later or even an hour later. Protecting NATO against criticism or embarrassment is not a reason to classify or withhold information.

c. **Ensure that information provided is consistent, complementary, and coordinated.** One effect of the global information environment is that publics can receive information about military operations from all levels of command, including reports from theatre from multiple sources. Commanders should ensure that their PA operations put forth a consistent message through NATO’s many voices, and that military information activities\(^2\) are well co-ordinated with PA according to the NATO StratCom Policy.

\(^2\) Information activities are actions designed to affect information and/or information systems, performed by any actor and include protective measures. (AJP 3.10)
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d. Practise appropriate operational security. The provisions of operational security and propriety will be considered and adhered to before releasing information.

e. Conduct work mindful of multinational sensitivities, and respectful of the local and regional cultural environment. NATO operations can be adversely affected by culturally inappropriate references or communications activities. Conversely, the effect and impact of communications is made stronger when it is informed by an understanding and appreciation of local custom, tradition and culture.

RESPONSIBILITIES

10. NATO military PA is a command responsibility at all levels. Practitioners are directly responsible to their respective commanders for the conduct of PA activities, and responsive to guidance from the PA function at higher HQs.

11. Public affairs must be well coordinated within the Alliance’s military arm vertically through all levels of command and horizontally with national armed forces and other organisations working in parallel with NATO. Effective PA support to commanders including organisational spokespersonship requires that military PA be fully integrated into the operational planning process at all NATO HQs, at the earliest possible stage.

12. Political Level. The North Atlantic Council provides overall guidance and direction for Strategic Communications which include NATO public diplomacy efforts, military Public Affairs, as well as mission-specific strategic and political guidance for NATO military information activities. According to the NATO StratCom Policy, the Assistant Secretary General for Public Diplomacy (ASG/PDD) is responsible for the coordination of StratCom activities across all NATO civilian and military bodies and commands, and also directs all public diplomacy activities except press and media. Detailed day-to-day media relations and messaging guidance to NATO military PA through the chain of command, either to SHAPE for operational matters or to ACT for transformation issues, are directed by the NATO Spokesperson on behalf of the Secretary General. The NATO StratCom Policy Board (SCPB), chaired by ASG/PDD, is the designated directing body for NATO StratCom issues. The StratCom Standing Working Group (SCSWG) is a permanent working group undertaking tasks directed by the SCPB. It is forward-looking in its approach, providing focus of effort and the development of specific StratCom direction and guidance outside the SCPB meeting cycle. It covers emerging issues, all NATO’s operations, missions and exercises, as well as specific StratCom activities.

13. NATO Military Committee. The Military Committee establishes overall policy for NATO military PA. The Chairman of the Military Committee is the principal military spokesperson for the Alliance on all military issues. The International Military Staff’s Public Affairs and StratCom Advisor (IMS PA&SCA) supports that organisation’s PA

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5 While information operations focusing on preserving and protecting Alliance freedom of manoeuvre in the information environment should take place at all times, information operations activities focused on influence and counter command... may only take place as part of an OPLAN and thus with NAC approval, including definition by the NAC of adversaries and potential adversaries. (NAC Decision reflected in cover page to MC 422/3(Final), 08 Jul 08)
requirements, is the MC's spokesperson, and facilitates interaction and coordination between the two Strategic Commands, the Military Committee and the Public Diplomacy Division on military PA matters. The IMS PA&SCA is also the principal contact within the IMS for StratCom issues, and as such represents the Director General, IMS at all StratCom meetings and specifically on the SCPB and the SCSWG.

14. **Strategic Commands.** The Strategic Commanders provide overall guidance and direction on military PA within their respective areas of responsibility. Supreme Allied Commander Europe is the principal military spokesperson for NATO operations. Supreme Allied Commander Transformation is the principal military spokesperson for NATO transformation.

15. The Chief Public Affairs Officer (CPAO) SHAPE directs, plans, and executes strategic level military PA for ACO in support of NATO operations or other activities under SACEUR's direction and responsibility. The CPAO for ACT directs plans and executes strategic level military public affairs in support of NATO transformation activities under SACT's direction and responsibility. The CPAO ACT is also responsible for NATO-related training and doctrinal aspects of NATO military PA, consulting with the IMS PA&SCA and the CPAO SHAPE to determine priorities and scope.

16. **Subordinate Commands.** CPAOs for operational and tactical-level Commands and organisations subordinate to ACO and ACT are responsible to their respective commanders for all public affairs programming and activities of their HQ.

17. **Elements of the Force Structure and Subordinate Agencies, Bodies, and Committees.** The NATO Force Structure consists of forces placed at the Alliance's disposal by the member nations, temporarily or permanently, including the associated command and control elements. These can be part of NATO's multinational forces or be additional national contributions to NATO. Both NATO and elements of the Force Structure benefit from being publicly affiliated with each other. As such, when an issue or activity could become public and affect each other's reputation, liaison between PA offices should occur ahead of time.

18. Other organisations, committees and sub-committees that are the responsibility of the Military Committee (such as the NATO Defence College), SACEUR (such as the high readiness land and maritime forces) and SACT (such as the Training Centres and the NATO Undersea Research Centre) are responsible for delivering their own PA programming. They will seek functional PA guidance from the IMS PA&SCA, SHAPE CPAO, or ACT CPAO respectively.

19. **Nations.** Member nations have primary responsibility to inform public opinion within their own country about decisions taken in the framework of their Alliance membership, including participation in Alliance operation and activities. Nations provide trained and qualified PAOs for national requirements and to fill positions in NATO's permanent headquarters, operations and other activities.

20. The NATO Countries Public Affairs Community (NCPAC) is established as a direct information link between the military PA offices in NATO capitals and NATO HQ. The NCPAC serves as a two-way tool for exchanging valuable information on PA issues, training opportunities and other NATO-related issues.
21. NATO Military PA. NATO military PA works on behalf of all member nations to promote public awareness of the Alliance, as well as to inform internal NATO audiences. NATO also promotes joint PA education and training, and develops joint PA doctrine and lessons learned.

22. Resourcing. All NATO HQs are required to have a PA function, but personnel and financial requirements will vary. The PA function needs to be sufficiently staffed with trained and experienced personnel and resourced to meet the operational and policy issue tempo of the headquarters and its activities. The minimum capability requirement includes PA plans and policies, media operations, media monitoring and analysis, and production (writing, imagery, and web services).

23. Operating successfully in today’s complex operational and media environment requires that military PA personnel be trained and skilled in all aspects of PA work at the strategic, operational, and tactical levels. Allied nations are encouraged therefore to develop national military PA capability and to recruit, educate, train, employ and promote within the profession in order to build the experienced capability required for this specialised discipline. Training should recognise the high potential for employment in operations in a joint, multinational environment. At the same time, shortfalls should be constantly monitored in NATO HQs and in operational theatres, both in quality and quantity.

24. The NATO Military StratCom Concept\(^4\) identifies required military capabilities essential to delivering effective NATO StratCom initiatives. It gives a clear outline on the way ahead for the development of the military StratCom process and of its supporting military communication and coordinating capabilities.

**PLANNING AND EXECUTING PUBLIC AFFAIRS**

**ORGANISATION**

25. Reporting Relationships. All NATO military headquarters and command elements will establish a PA capability within the Command Group. Public Affairs at each level of command directly supports the commander and may therefore not be further delegated or subordinated to other staff functions. The CPAO, as the principal advisor on PA matters and official spokesperson for that HQ, reports directly to the commander. All supporting PA activities should be organised under the PAO.

26. PA Relationship to StratCom. The CPAO supports the commander’s StratCom process by ensuring that PA actions, plans and objectives are coordinated as part of the broader StratCom effort. The commander’s StratCom structure will not affect the direct link of the Spokesperson or the CPAO to the commander, nor modify the inter-relationships between the different information disciplines, as stated in the NATO StratCom Policy and the respective MC policies governing PA, Info Ops and PsyOps.

\(^4\) MCM-0085-2010 (Rev), 11 Aug 10. NATO’s Military Concept for Strategic Communications (approved by NAC 18 Aug 10).
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27. PA Relationship to Information Operations. PA and Info Ops are separate, but related functions. They directly support military objectives, counter adversary disinformation and deter adversary actions. They both require planning, message development and media analysis, though the efforts differ with respect to audience, scope and intent. All military information activities must be closely coordinated with PA in order to ensure consistency in the messages to external audiences and to promote overall effectiveness and credibility of the campaign. Info Ops is a military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other NAC-approved parties in support of Alliance mission objectives. PA is not an Info Ops discipline. While coordination is essential, the lines of authority will remain separate, the PA reporting relationship being direct to the commander. In addition, organisational arrangements must take account of the damage that can be done to NATO’s credibility if there is a perception that, through PA activities, NATO is attempting to unduly manipulate audiences or the media. Beyond coordination of efforts, messages and being informed of these activities therefore, PA will have no role in planning or executing Info Ops, PsyOps, or deception operations.

METHODOLOGIES

27. PA Approaches. NATO policy is to release accurate information with the minimum of delay that is consistent with operational security and propriety. The PA approach for each activity or situation needs to be assessed on a case-by-case basis, being attentive to the public and external/internal audience interest, and is informed by PA considerations of good issue management and security.

28. A PA approach provides a guide respecting the level of ambition or expectations of the desired profile for an activity, event or issue. Given that everything NATO does or does not do is subject to public scrutiny, this characterization of “intent of effort” helps prioritise work and assign resources. Remaining flexible in the face of changing circumstances is important, as the facts that informed the original assessment can change in very short order and may necessitate a different approach than first thought. The choice, therefore, will indicate initial intent but will always be subject to review and direction from higher HQ. The PA approach with respect to external and internal audiences is not necessarily identical for the same issue. Guided by its PA principles, NATO defines three military PA approaches:

a. **Very Active.** Significant and deliberate effort will be invested to promote awareness, visibility and to “push out” information. This approach is called for where real public interest is anticipated or desired and may be supported by a wide range of PA products and activities.

b. **Active.** Routine effort will be invested to promote public awareness; the range and scope of information products or support activities are generally limited. This approach may be used when the activity is expected to have some audience interest, or where the public affairs return on investment given the time and resources expended is expected to be modest.
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c. Reactive. Efforts are not made to promote wide awareness, but a PA plan and media lines should be developed in anticipation of media or public queries. As such, being reactive still means being responsive to queries: not answering the phone or saying “no comment” are not options. A reactive approach could be used when little to no public interest is anticipated; where operational security, policy, privacy, propriety, or higher guidance indicates that an active or proactive approach is not appropriate; or when full disclosure is not yet possible.

29 Spokesmanship. Since the commander is likely to be seen as the most credible spokesperson for his/her mission or headquarters, he/she will often speak publicly, and should therefore seek and receive the advice and support of his CPAO, specifically in preparation for media interviews or public engagements. However, any uniformed member of NATO regardless of rank or position, who responds to media or speaks publicly about an issue, will be perceived as “a NATO military spokesperson,” regardless of whether that is technically the case or not. This reality calls for a clear and advance understanding as to who is authorised to speak to media or the general public on behalf of the organisation and its commander, and a basic level of media awareness training for all NATO personnel.

30. Identifying spokespersons is a command responsibility and all NATO military HOs will identify someone, be it an individual or through appointment, as the public face of the organisation. Military spokespersons will “stay in their lane”, limiting their comments to matters respecting the military operation or function within their area of responsibility. There are two categories of military spokespersons:

a. Official. Official spokespersons are those persons who by virtue of their position or appointment are expected and authorised to speak to the media, the public, or internally about NATO military affairs. This includes the Chairman of the Military Committee, the Strategic Commanders, Force and Operational Commanders, and the CPAOs of all those organisations.

b. Designated. Refers to those persons who by virtue of their job description or responsibility are authorised to communicate externally or internally about NATO military affairs. This includes NATO Media Information Centre and NATO Media Operations Centre spokespersons, and subject matter experts who have been tasked to communicate externally or internally about a specific issue or topic. Where possible and practical, they should be prepared ahead of time for the engagement by a PAO.

31. Information provided by NATO military spokespersons should normally be directly attributable to them by name. Being “on the record” serves several purposes: It provides an identifiable source for the information and thus adds to the organisational credibility of the information, it identifies when official NATO military spokespersons have addressed an issue, and it promotes transparency both of the media and the organisation. In the circumstances where the person providing the information cannot be identified by name for operational or personal security reasons, this must be specified as non attributable, and agreed ahead of time between the spokesperson, and/or the PAO and the journalist. As a general rule, PAOs should encourage the use of attributable information.

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32. "On background" is supporting information given to media representatives to facilitate greater understanding of an issue. It will be stated at the time whether that information may be used, and if it is, it should appear to come from the journalist’s own knowledge, and not directly attributed to the NATO military spokesperson(s).

33. Organisations that belong to the NATO Force Structure are not in the NATO Command Structure. Unless involved in a NATO operation, personnel belonging to the NATO Force Structure should not be identified as NATO spokespersons. Rather, they speak only for their own organisation, although they are welcome to explain the nature of the affiliation with NATO.

PROCESS AND MECHANICS

34. PA Guidance. CPAOs may develop and promulgate Public Affairs Guidance (PAG) to address issues not described or forecast in existing operational plans or strategies. Usually, PAGs will recommend the approach, summarize the issue, identify the lead organisation(s), identify spokespersons, list messages and provide coordinating instructions.

35. PA Strategies and Plans should be developed in support of organisational objectives, consistent with the StratCom policy for the HQ, command or operation, and at the earliest possible stages. Plans should clearly identify key themes, messages, objectives, responsibilities and resources required. Before elaborating a strategy, the PAO should conduct a serious analysis of the PA environment from the perspective of both internal and external communication. Key messages developed by higher NATO political and military authorities will be included and used in subordinate PA strategies and plans. Furthermore, PA activities should be regularly evaluated for effectiveness, reporting status to the higher echelon and adjusted as required to meet evolving circumstances.

36. Public Speaking and Writing. Explaining NATO to interested audiences by members of the organisation is to be encouraged. Any person working for or on behalf of NATO military forces who speaks in an organised setting or fora external audiences or intends on publishing his/her writing about a NATO-related topic in the public domain needs to seek advice from that organisation’s PA staff, who will advise on whether prior approval from the member’s chain of command should be sought. Academic works are exempted: these need to include a disclaimer on the cover page stating that, “the views expressed herein are those of the author and do not necessarily reflect the official views of NATO.”

37. Public and Media Queries. Any and all media queries will be directed to a PAO within that HQ or unit so that interest in the activity or issue can be tracked, assessed and dealt with in an appropriate fashion. Queries from non-media members should be handled with common sense and discretion: a simple request received by telephone for general, generic information that is a matter of public record and/or within that person’s specific knowledge, should normally be provided on a background/not-for-attribution basis. Personnel should not speculate or inadvertently participate in an interview – any call received from the news media or the public, including interest groups, may be
38. **Media Interviews.** All interviews between external media outlets and personnel assigned to permanent and deployed NATO HQs requires that the organisation's PAO be made aware beforehand, and may require approval of the chain of command including the Commander if the subject is of a sensitive nature. The interview should be monitored by a PAO in attendance.

39. Media requests for interviews with personnel deployed in NATO-led operations and under NATO command should be coordinated with the responsible national or NATO PAO, as appropriate, who will evaluate the request and recommend a course of action.

40. **Ground rules for media interviews.** All media interviews will be agreed and explained in advance to the news media by the PAO, and unless otherwise agreed by a CPAO, all interviews will be on the record. Persons should speak only about matters within their professional knowledge and responsibilities. They should avoid speculation about events, incidents, issues or future policy decisions; should not comment on political matters; and must "stay in their lane", avoiding comments on issues and activities that they or their unit are not involved in. Where, for good reason, prior approval for an interview was not possible (for instance, a member is involved in an incident and a journalist comes on scene and obtains a quote from the member), the PA chain must be informed as soon as possible.

41. **PA Products.** There are many and varied PA products in different forms and formats to tell and show the NATO story, whether they be in anticipation or in reaction to an issue, or to promote a NATO event or activity. Appended to this policy is a lexicon of terms for products that form the core of NATO military PA efforts. NATO military PA products will adhere to the NATO Visual Identity Guidelines, as determined and issued by the Public Diplomacy Division.

42. **Imagery.** The increasing dominance of visual media, particularly in light of new technologies, means that NATO cannot effectively tell its story without making imagery available to external and internal audiences. This can take the form of NATO providing imagery itself (e.g. through the NATO Website Multimedia Library and from NATO TV products), or by facilitating media access to NATO people and activities. All PA activities should therefore consider ways and means to collect, properly identify and distribute imagery (still and video, plus sound). Nations that do not already have a deployable military imagery gathering capability are encouraged to develop one. In addition to supporting national PA objectives, proactively sharing imagery with higher NATO headquarters will help leverage its overall impact with regional and international audiences, an effect that may be difficult for any one nation to obtain. NATO encourages nations to implement policies for the rapid identification and declassification of such imagery in order to make it available to support PA efforts.

43. **Internet.** The Internet is arguably one of the most powerful PA and information tool available to NATO military PA, and all HOs shall budget accordingly to remain competitive as quality information providers. Internet sites inform a wide range of audiences and therefore need to be current, easily navigable, visually appealing,
interactive, and in accordance with NATO visual guidelines. PAOs are responsible for content management and the appearance of their respective NATO Internet websites. Local directives respecting PA involvement in Command/HQ Internet sites may be issued.

44. **Blogs and other internet Communications.** Those who post information, news, views or opinions to the Internet using a personal site (a "blog") can be as competitive and influential as the most established and recognized media organisations, sometimes even more so. Blogs and other internet-based fora may be engaged directly or indirectly (i.e. by posting a comment) but whichever route is taken, those acting in an official NATO capacity should make their position clear. Often, media organisations encourage their own staff to create and maintain blogs as a means to enhance and connect with their readership. "Citizen journalists" may not be accredited media, but they are engaged in the security debate, be they well informed or otherwise. They can exert influence over public perception and understanding of NATO operations and activities and should be considered and factored into PA plans.

45. The widespread availability and access to Internet even by personnel deployed in the most austere of locations results in considerable information describing experiences included on personal websites, social media networks, blogs, e-mails, and uploaded still and video imagery. This material is posted by NATO members deployed on operations or in garrison, by families and acquaintances of NATO members, embedded journalists or other media, and the general public. Such information or imagery may, either individually or in conjunction with other information, provide adversary analysts with insights into NATO current operations, equipment, capabilities, tactics and intentions, or may provide information that puts personnel in specialist roles or their families at risk.

46. The authorities and guidelines respecting public electronic communications are no different than those for other forms of external communication. Just as a letter to the editor by a NATO military representative is subject to an approval process, the mere fact that the technology exists to allow virtually anyone to broadcast to the world, does not give blanket authority for NATO personnel to do so. That said, the Internet provides the NATO soldier, sailor or airman/airwoman with excellent opportunities to distribute useful and compelling information about NATO activities to audiences.

47. NATO members are entitled to communicate with friends, family and colleagues, and may share experiences with the broader public, provided they adhere to the provisions of security and propriety. NATO personnel are therefore advised to consult with their chain of command before publishing NATO-related information and imagery to the Internet. The chain of command has expert advisors, such as public affairs and intelligence staffs, who will ensure that such published information is not ultimately prejudicial to NATO operations and personnel.
48. Exercises and Training. More than a hundred NATO exercises and training events both small and large are conducted every year, and are listed annually in an MC-approved program. This is in addition to nationally sponsored exercises to which NATO and partner nations are invited to participate, and these are the sole responsibility of the sponsor nation.

49. Both the NATO military HQ that is scheduling the NATO exercise and the office conducting the exercise need to give early consideration to the public affairs value and/or the necessity of informing publics about it. Often, media will be aware of the fact that an exercise is being planned well before any formal acknowledgement of it by NATO. Given the long lead time to prepare logistics support and in some cases a need to conduct community relations activities to sensitize populations to the fact that NATO forces will be exercising in the area, PA engagement and support from the outset is required.

50. The scope of PA support and whether an Initial Exercise News Release (IENR) is needed to publicly and formally announce the exercise needs to be assessed by a PA practitioner. Major exercises in particular are an important element of the organisation’s overall information effort. In contrast, a small CPX or a training event on a highly technical subject is not usually likely to warrant a very active PA strategy.

51. The office conducting the exercise will recommend whether an IENR is advisable based on the exercise intent, size, scale, scope, and potential for becoming a news item. The exercise approach and IENR (if one is required) is subject to approval and issue by the office scheduling the exercise. Where there is a question about whether there are political considerations or implications with the exercise (geographic location, type of exercise, nations participating, etc.), the office scheduling the exercise will seek guidance from higher authority, up to and including the MC through the IMS PA&SCA if need be. The PA chain through to the IMS is to be informed and copied on the release ahead of its public distribution.

52. The Military Committee through the IMS PA&SCA can direct the responsible Strategic Command CPAC to provide an IENR for MC approval or guidance/approval by the NAC. In this case, the draft material should be staffed through the chain of command at least four weeks before the intended publishing date.

53. Classification of Information. Almost all NATO documents and information are by nature classified and thus PAOs face daily decisions and dilemmas respecting what can or cannot be released to the public. Obtaining formal authority from the originator to release classified information can be an unwieldy and lengthy process, even though all or part of the information may already be publicly available. The unduly restrictive classification of information can also limit the institution’s ability to quickly but accurately respond to queries or to proactively engage audiences in the interests of managing issues and thus the organisation’s reputation. As such, NATO military PAOs need to be thoroughly familiar with NATO policies respecting the classification and management of information so as to make informed and considered judgements respecting releasability. If in doubt, Command and higher functional PA guidance should be sought.
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PUBLIC AFFAIRS ON OPERATIONS

54. Accreditation and Registration of Media. Accreditation of journalists and other media representatives is a national responsibility. The NATO Public Diplomacy Division is responsible to verify journalists accredited to NATO HQ. To manage access to NATO media information centres, facilities, properties and people, NATO military PA staff will register media and may issue a NATO photo-registration card. This card does not guarantee access and does not serve as a substitute for official identification documents, such as passports or national identification cards. Media representatives must also meet other requirements imposed by host nations, such as visas.

55. Registration of media provides an important opportunity for deployed NATO military PAOs to meet with journalists preparing to cover activities, including the chance to explain ground rules and regulations respecting safety, operational security, logistics, and to provide background and operational context. In addition to learning which media are active in their area, it provides the PAO with an occasion to begin developing a relationship with the journalist, and accountability of the media representative in the event of an emergency.

56. Media Information Centres. All NATO-led military operations or other activities involving a major deployment of forces will establish a facility in theatre, which will normally take the form of a NATO Media Information Centre (NMIC) in a location and facility as accessible to the news media as security conditions allow. Media have a right to be in theatre and to cover NATO activities. NMICs should also be established for major training events. Media Information Centres (MICs) subordinate to the NMIC may be established.

57. The demand for news about a particular NATO activity is not necessarily directly related to the size of the deployed force. A small deployment can generate sustained international attention, whereas a large force that has been operating without incident may attract very little interest. The PA organisation should be sized for the task and manning reassessed during regular Peacetime Establishment (PE) and Crisis Establishment (CE) reviews.

58. Media Integration. NATO Allies should encourage access of the media to Alliance operations and other NATO activities, including hosting accredited media representatives at field headquarters or units. Media can be represented by accredited journalists (Article 79, Additional Protocol I, 1977), war correspondents (Article 4, Geneva Protocol III, 1949), or freelance journalists. As PA is a Command responsibility, the decision to host media in NATO HQs or units on operations is at the discretion of the affected HQ commander, in accordance with direction from theatre HQ and/or the policies established by the ACO HQ. Nations that individually establish media embedding programs are encouraged to see that media are offered the opportunity to meet with and be briefed by senior NATO officers or officials prior to being embedded. Ground rules respecting operational security and privacy are operation-specific and are the responsibility of ACO. Media representatives hosted by NATO will sign a waiver of liability exempting the nation and organisation from any claims that might arise as a result of any injuries, harm, or damage.
59. **Media Travel and Life Support.** Media representatives at all levels need to understand the challenges the military faces in working in fluid environments, and accept that blanket protection of media personnel will not be possible. Accordingly, journalists who expect to work in these types of environment should be trained in risk evaluation and the fundamentals of working alongside the military. The responsibility rests with the individual or the individual’s employer to ensure that they are appropriately prepared and trained for the assignment.

60. **Journalists will be expected to equip themselves with their own personal protective equipment (body armour, helmet). However, accredited correspondents may be issued with appropriate specialist protective clothing as well as being provided any required training in its use. Media who are hosted by NATO should be afforded life support (including accommodation and food), and may have access to communications and transport as the local situation and conditions permit.**

61. **Significant Incidents.** Significant incidents including casualties, accidents and damage to property or equipment involving NATO forces will quickly generate media and public interest and will be publicly acknowledged at the lowest appropriate level in the NATO chain of command. Such announcements will be made in close coordination with the nations and organisations involved. Nations, as well as organisations working closely with Alliance forces, retain the prerogative to release specific details about incidents involving their personnel, property or equipment, including the names of those killed or injured the details of damaged property or equipment, and the status of investigations or medical treatment.

62. **Casualties.** NATO PA offices in theatre will acknowledge deaths or serious injuries to military personnel under NATO command in accordance with the PA principles and notification regulations of nations. A number of considerations will inform when casualties are acknowledged, and each case or incident will be dealt with individually. Ideally, NATO military PA will inform media first, and thus be ahead of adversary efforts to shape and frame media coverage of the situation for their own purposes. This holds true in the case of single or multiple casualties from one or more nations.

63. **Release of the name, nationality and personal details of a service member or service members who die/dies or is seriously injured is a national responsibility.**

64. **Where military casualties are incurred during an ongoing operation, relevant and verified information will be disseminated by NATO PA to the media in a timely fashion, while respecting the prerogative of troop contributing nations to confirm the nationality and detailed nature of casualties and the detailed circumstances of the event. This requires speedy and proactive coordination to ensure message consistency amongst NATO and national PA communications.**

65. **The NATO CPAC in theatre will ensure close coordination with respective senior in-theatre national military representatives. Coordinating with troop contributing nations’ delegations and PA authorities in national capitals will normally be led by the Press and Media Section of the Public Diplomacy Division at NATO HQ. Coordinating procedures for announcing NATO civilian casualties will also be led by the Press and Media Section of the Public Diplomacy Division on behalf of the Secretary General.**
LEXICON OF TERMS

This lexicon groups together the most frequently used terms pertaining to public affairs work in NATO. Public affairs products are listed separately for ease of use. The terms used here are in the process of being submitted to the MC Terminology Committee to be considered for inclusion in AAP-6 NATO Glossary of Terms and Definitions.

ACCREDITATION
The formal recognition of a journalist or other media representative by an official national entity or international organisation; can also refer to the accreditation card or other document issued to the media representative. Accrediting organisations will physically verify the affiliation of an applicant with a specific news organisation.

AUDIENCE
A specified group or persons to whom NATO public affairs efforts are directed.

BLOG
First-person internet-based journal of personal views and opinions. Some achieve mass appeal or commercial status and compete with established and recognised news organisations.

CHECK AGAINST DELIVERY
Used to inform media that a speech text released prior to it being given (usually provided under embargo) must be compared to the actual speech, which takes precedence and should be used when quoting therefrom.

CHIEF PUBLIC AFFAIRS OFFICER (CPAO)
The senior PAO in a NATO permanent or field headquarters. The CPAO is the Commander’s public affairs advisor and official spokesperson, reporting directly to the Commander. Responsible for planning and implementing the PA campaign.

CITIZEN JOURNALIST
A person who independently gathers and reports news, views or opinions using means other than through a media organisation, frequently through social media networks.

COMMUNITY RELATIONS (COMREL)
One of the three pillars of NATO military PA. Refers to the relationship between military and civilian communities in proximity to NATO installations in the Alliance’s member nations, including the general public, business, service organisations, and other non-media entities.

EMBARGO
An agreement with one or more media representatives or organisations not to publish defined information before a specified date and time. This is usually applied to protect time-sensitive information.
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FACILITIES
Transport, briefings, shelter, communications, power, etc., which enable media to gather (witness, hear) information, record (type, visual, audio) it, and transmit it via commercial or military means.

FREELANCE(R)
An independent journalist not employed continuously on a full-time basis with any one media organisation. They usually sell their work to one or more media organisation(s) on a piece by piece basis during temporary assignments.

GROUND RULES
Conditions mutually agreed in advance with a media representative, that govern the terms of an interview or other activity and the use of that information.

INFORMATION ACTIVITIES
Actions designed to affect information and/or information systems. They can be performed by any actor and include protective measures. (see MC 422/3)

INFORMATION OPERATIONS (INFO OPS)
A military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other NAC approved parties in support of Alliance mission objectives. (MC 422/3).

INITIAL EXERCISE NEWS RELEASE (IENR)
The initial news release formally announcing a NATO military exercise. The responsibility and authority for this rests with the officer scheduling the exercise and is produced in consultation with higher HQ where there are public and/or political sensitivities.

INTERNAL INFORMATION
One of the three pillars of NATO PA. Organisational communication with NATO members, civilian employees and family members of those serving with or affiliated to NATO. It does not include activities of officers or managers for the purpose of informing their staffs of unit or section developments or communications that provide administrative direction. Also referred to as Command Information.

JOURNALIST
A person employed by a media organisation to gather and report news.

JOURNALISTS IN AREAS OF ARMED CONFLICT
Journalists engaged in dangerous professional missions in areas of armed conflict who do not meet the requirements for designation as war correspondents are recognized under Article 76, Additional Protocol 1, 1977 as "civilians". Journalists who have fallen

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5 NAC approved parties are those identified in top-level political guidance on Alliance information activities. These may include adversaries, potential adversaries, decision makers, cultural groups, elements of the international community and others who may be informed by Alliance information activities.
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into the power of the enemy are guaranteed the protections afforded that status under the various Conventions and Protocols.

MEDIA
Those organisations or persons who gather and disseminate news; also refers to the mediums by which news is transmitted (newspapers, TV, radio, internet, etc).

MEDIA ESCORT
A person assigned to accompany journalists and other media representatives.

MEDIA INFORMATION CENTRE (MIC)
One or more centres subordinate to an NMIC that are operating in forward locations.

MEDIA OPERATIONS
All activities pertaining to managing the interaction with the news media; can refer to the function responsible for such activities, such as the "media operations section".

MEDIA OPERATIONS CENTRE (MOC)
That element of a PA office or section established within a NATO body, mission or operation, to deal with day-to-day management of media operations, specifically in response to crisis management.

MEDIA POOL
News media who mutually agree to gather and share material with a larger group when access to an activity or event is limited, typically when news media support resources cannot accommodate a large number. Some ground rules may be agreed in advance to ensure that different types of media are granted access. In general, the PAO should indicate the availability of the breakdown of seats available and leave selection of who is in the pool to the media representatives.

MEDIA REPRESENTATIVE
All persons accredited as journalists, including those who directly support the gathering and reporting of news, such as producers, researchers and photographers, excluding drivers, interpreters, or others not directly involved in the news process.

NATO MEDIA INFORMATION CENTRE (NMIC)
A public affairs facility established to host and inform journalists and other media representatives in a NATO operations mission or exercise area. A NMIC will normally contain a briefing area, offices for public affairs staff, and should offer telephone, internet and other services to media representatives.

NATO MILITARY PUBLIC AFFAIRS (PA)
The function responsible to promote NATO’s military aims and objectives to audiences in order to enhance awareness and understanding of military aspects of the Alliance. This includes planning and conducting external and internal communications, and community relations.

NEW MEDIA
A generic term for many different forms of electronic communication that are made possible through the use of computer-based technologies.

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PROPAGANDA
Information, ideas, doctrines, or special appeals disseminated to influence the opinion, emotions, attitudes, or behaviour of any specified group in order to benefit the sponsor either directly or indirectly:
- Black: purport to originate from a source other than the true one.
- Grey: does not specifically identify any source.
- White: disseminated and acknowledged by the sponsor or by an accredited agency thereof.

PSYCHOLOGICAL OPERATIONS (PSYOPS)
Planned psychological activities using methods of communication and other means directed to approved audiences in order to influence perceptions, attitudes and behaviour, affecting the achievement of political and military objectives. (see MC 402).

PUBLIC AFFAIRS APPROACH
The level of public profile to be adopted. It may change in time, space and phase of any operation. An approach can be very active, active or reactive, and be different for external and internal audiences.

PUBLIC AFFAIRS OFFICER (PAO)
A person trained and qualified to practice public affairs. In NATO, a person posted or hired into a position established as a PAO or a PA Advisor.

PUBLIC DIPLOMACY
The totality of measures and means to inform, communicate and cooperate with a broad range of target audiences world-wide, with the aim to raise the level of awareness and understanding about NATO, promoting its policies and activities, thereby fostering support for the Alliance and developing trust and confidence in it. See SG(2003)0876(INV).

PUBLIC DIPLOMACY DIVISION
The Division located at NATO HQ Brussels, and headed by an Assistant Secretary-General, responsible to explain the NATO organisation’s policies and objectives to the public.

REGISTRATION
The process of confirming the credentials of a journalist or other media representative. The media representative may be required to fill out a registration form and provide proof of identity and affiliation with a news organisation. NATO may issue a photo-registration card to facilitate access.

SECURITY AT THE SOURCE
The practice of protecting sensitive or classified information where it originates. In PA, this means ensuring that media representatives are not unintentionally exposed to sensitive or classified information and cannot intentionally or unintentionally report it.

SOCIAL MEDIA NETWORKS
Networks designed for the dissemination of information and messages through social interaction using Internet web-based technologies, often leading to conversational debate.

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STRATEGIC COMMUNICATIONS
The coordinated and appropriate use of NATO communication activities and capabilities – Public Diplomacy, Public Affairs, Military Public Affairs, Info Ops and PsyOps – in support of Alliance policies, operations and activities, and in order to advance NATO’s aims (see PO(2009)0141).

WAR CORRESPONDENT
A “war correspondent” is a journalist who has been authorised by, and issued an identity card from, a national armed force to accompany that force. War correspondents that have fallen into the power of the enemy must be accorded the status of “prisoner of war” and are guaranteed the protections afforded that status under the various Conventions and Protocols.
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PA PRODUCTS:

BACKGROUNDERS
An explanation of an issue, activity or program, usually to provide context and perspective for the use of journalists. Can refer to a product, generally a written piece, or to a verbal briefing and/or presentation by a spokesperson.

FACT SHEET
An overview of data and information on a specific topic. Generally is a collection of factual information as reference material, and short on the effort to impart explanations.

IMAGERY
All materials that identify NATO personnel, equipment or activities through the use of visual images.

INTERNET POSTING
The process of loading a presentation or product onto a publicly accessible server, and creating the links required to make the item publicly "live."

MEDIA ADVISORY
An alert to inform media agencies of an upcoming newsworthy event or activity.

MEDIA LINES
Also called Talking Points and/or Messages. Organisationaly approved responses to an issue for use by spokespeople when dealing with media.

MASTER MEDIA MESSAGES
Overarching, key 3-5 points developed by a higher political or military authority and incorporated into the products and activities of subordinate organisations. Ultimately, reduces even the most complex of issues into a manageable number of remarks of sound bite-length.

MEDIA OPPORTUNITY
Also called Press Point, Newser, Presser, Media Availability. A chance for media to meet with an organisational spokesperson, usually on camera and often before or after a notable meeting or activity. It is distinguished from a news conference in that the setting in a media opportunity is regarded as more impromptu and less formal, with quite limited time with the spokesperson and not necessarily with a view to imparting “new news.”

NEWS RELEASE
Information designed to notify audiences, particularly media, of an event, issue or activity that is newsworthy, and generally, something that has just happened or is just about to happen. Usually provides an organisational position, view and/or statement.

NEWS CONFERENCE
A group of two or more media purposefully gathered to obtain information from an organisational spokesperson. Implies there is something new or newsworthy to impart; otherwise, use a media opportunity.

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OPED
Originating in print journalism, op-ed is an abbreviation of “opposite the editorial page”, (often mistakenly thought to mean opinion-editorial). It refers to an article that expresses the personal opinions of a named writer not normally on the editorial staff of the publisher. These are different from editorials which are often unsigned and written by editorial board members.

PUBLIC AFFAIRS GUIDANCE (PAG)
Addresses emerging public affairs issues or issues likely not covered by existing plans or guidance, and issued as required by CPAOs. At a minimum, PAG will recommend the approach, summarize the issue, identify lead organization(s), name spokespersons, list messages, and provide coordinating instructions.

PUBLIC AFFAIRS PLAN
Details relating to the planning and conduct of a PA-related activity; in effect the “execution” paragraph detailing what will be done, where, when, how and by whom. Can be an annex to an operation or contingency plan, or stand on its own.

PUBLIC AFFAIRS STRATEGY
A document that provides a broader public affairs approach that sets overall themes and goals for an organisation or initiative. Should include master messages. Action-oriented PA plans derive their guidance from PA strategies approved by higher authorities.

QUESTIONS AND ANSWERS
A document that provides spokespersons with organisationally approved lines to a series of questions expected from media.

STATEMENT
Remarks by the speaker at an event, usually to public audiences.

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Enclosure A.3  ACO Public Affairs Policy – AD 095-001

ACO DIRECTIVE (AD) 095-001

ALLIED COMMAND OPERATIONS PUBLIC AFFAIRS

REFERENCES:

B. AD 95-2, ACO Strategic Communications, dated 21 May 2012.
C. AD 95-3, Social Media, dated 03 December 2009.
F. SD 070-604, Visits to SHAPE, dated 14 February 2013.


2. **Purpose.** This directive states policies, responsibilities, procedures, organisation and concept of military Public Affairs (PA) activities in ACO, including ACO military PA support to NATO Partner Nations exercises.

3. **Applicability.** This directive is applicable to all ACO headquarters/units and forces under the operational command or control of ACO headquarters/units. This directive should be used as a guide for the preparation of local directives and policies. It should also be used as a basis for developing and fielding ACO, and national, Public Affairs (PA) support structure to meet Alliance military PA support requirements in peacetime, tension, crisis and conflict.

4. **Publication Updates.** Updates are authorised when approved by the Director of Management (DOM), SHAPE.

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5. **PropONENT**: The proponent for this directive is the SHAPE Public Affairs (PUA) office.

FOR THE SUPREME ALLIED COMMANDER, EUROPE:

Gintautas Zenkevicius
Brigadier General, LTU A
Director of Management
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CHAPTER 1 - MILITARY PUBLIC AFFAIRS MISSION AND DOCTRINE

1-1. Introduction

“The Parties to this Treaty reaffirm their faith in ... the Charter of the United Nations. They are determined to safeguard the freedom, common heritage, and civilisation of their peoples, founded on the principles of democracy, individual liberty, and the rule of law.”

Washington Treaty, 1949

a. The need to communicate effectively with a wide range of audiences is not just desirable, it is essential to gain understanding and support for NATO's operations. Public support for NATO's missions and tasks follows from public understanding of how the Alliance makes a difference to international peace and security. Public confidence, in turn, is enhanced by NATO's ability to achieve its mandate in a way that is open, transparent and consistent with member nation values and expectations.

b. NATO military PA is the function responsible to promote NATO's military aims and objectives to audiences in order to enhance awareness and understanding of military aspects of the Alliance. Military PA policy in NATO and the nations derives from the higher principles of democracy, which include freedom of expression and of the press. NATO policies require Commanders and Public Affairs Officers (PAO) to inform the public directly about significant activities and operations using means such as the media, briefings to the public, social media and the Internet.

c. NATO's adversaries have multiple tools at their disposal to inform and persuade the international community that they have the moral high ground and that NATO does not. They use technology and speed to their advantage, often disregarding truth in the process. This is the public environment in which NATO operational commanders must conduct their missions. Public Affairs is critical to mission success in today's comprehensive operations and should therefore be integral to mission planning. The effects that military PA can achieve are many, but the two main ones are to enhance public understanding and maintain Alliance credibility in the public eye.

1-2. Mission. The mission of ACO military PA is to support Alliance aims and objectives through truthful, accurate and timely communication with audiences and stakeholders, regarding operations and activities of forces assigned to, or under operational command or control of the Supreme Allied Commander Europe (SACEUR). Any engagement should be consistent with NATO and national policies for operational security, and the privacy of forces and personnel involved.

1-3. Functions. The three basic functions of NATO military PA are mentioned below. It should be noted that the tools found in External Communications (a(3)-a(5)) are equally applicable to Internal Communications and Community Relations.

a. External Communications

(1) Media Relations. Activities designed to provide information through traditional mass communication means to NATO audiences. Commanders and staffs, through their PAOs, should be prepared to, for example, respond to media inquiries, issue press statements, conduct media briefings and interviews, arrange...
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for access to permanent and operational units, and distribute information including imagery, the aim of which is to develop relations with the purveyors of news in order to utilise their platforms to communicate efficiently and effectively to mass audiences.

(2) **Outreach.** Activities aimed at fostering strategic relations with key external stakeholders, who have an interest in military issues and activities, such as think-tanks, academia, military-related associations, and other non-news media entities. They are often invited to comment as unbiased subject matter experts (SME) in the field of security and defence policy, and more specifically on NATO policy decisions and actions, and can therefore provide a sustainable “force multiplier” effect.

(3) **Internet and Social Media.** Activities aimed at informing various audiences using new media and technology including internet and social media platforms. These tools are effective as they allow genuine two-way communication with audiences without a traditional media ‘filter’. Social media allows for conversations, the exchange of ideas and the opportunity to build rapport with audiences.

(4) **Media Monitoring, Social Media Monitoring, and Analysis.** Activities aimed at scanning and understanding the media and public environment, including public opinion, trends, powerbrokers and networks. Knowing and understanding the communication environment and audience mindset are critical to successful communications activities. This capability must be adequately resourced if it is to be effective.

(5) **Imagery.** The collection and dissemination of still and video imagery is critical to mounting effective public affairs campaigns. The likelihood that NATO messages will be picked up by media outlets and shared via social media networks increases dramatically when supported by relevant and high-quality imagery that is properly captioned. PA imagery assets should be employed to gather operational imagery whenever possible.

b. **Internal Communications.** Efforts to facilitate communication with and among NATO military personnel, civilians and their families. Its purpose is to inform internal audiences about the principle roles, policies, and activities of the command or HQ, as well as the intent and objectives of the Commander. This is critical as NATO members are the most effective advocates for the Alliance, and therefore must be well informed if they are to communicate effectively. It should be noted that this function is distinct from administrative information or direction from the chain of command that is normally found in administrative or routine orders. Effective programmes create an awareness of the organisation’s goals and activities, increase work quality, and make command personnel more effective representatives of the organisation. Those people in turn spread the message to their acquaintances, in effect becoming force multipliers.

c. **Community Relations.** Programmes usually associated with the interaction between NATO military installations in NATO member states and their surrounding or nearby civilian communities. It is important for NATO installations to establish relationships with institutions and organisations in the region. These relationships pay
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dividends, particularly when issues arise. Commanders and Public Affairs personnel should place a priority on establishing and fostering such relationships.

1-4. Doctrine/Principles of Information. ACO PA doctrine and principles apply across the spectrum of operations from peace to conflict. The principles of NATO military PA outlined in MC 0457/2 also apply to ACO. Military PA is a command responsibility. The PA function and PA staff at each level of command are directly responsible to the commander/command group. It may not be further delegated or subordinated to any other staff function below the command group. Commanders at all levels must ensure that military PA planning is integrated into operational planning so that the following principles are achieved:

a. Truthful, accurate and timely release of information in order to inform the public regarding all aspects of NATO's operations activities.

b. PA activities in support of NATO operations respect the democratic principles of openness and transparency in the communication process.

c. Requests for information on topics within the purview of NATO and ACO will be answered in as timely a manner as possible, following these guidelines:

(1) ACO PAOs will limit their comments to information that is within their purview and headquarters responsibility. ACO PAOs are not a source of national information. Requests for information that fall within the responsibility of the nations will be referred to the appropriate MOD information office.

(2) Requests for information with a political context will be referred, without comment, to the Press & Media Section of the NATO Public Diplomacy Division (PDD), if not previously co-coordinated and approved.

(3) Requests for information with significant legal content or implications (which are not always obvious) should be answered only after consultation with the appropriate legal office/advisor.

(4) Information should be provided without censorship and all bona fide media agencies will be provided equal access to information.

(5) Information should not be classified or otherwise withheld to protect ACO from criticism or embarrassment.

1-5. Policies for Release of Information

a. Commanders, as advised by CPAOs, must balance the media's need for accurate information as close to real time as possible with the demands of operational security in order to determine what information should be publicly released and establish release procedures and priorities.

b. The principles of openness and transparency should be weighted against the principle of operational security for NATO operations. In respecting the principle of operational security, no PA activity should undermine:
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(1) the safety of personnel involved in a NATO operation; or

(2) the likely success of a NATO operation or activity.

c. NATO doctrine defines three military PA approaches:

(1) **Very Active.** Significant and deliberate effort will be invested to promote awareness, visibility and to “push out” information. This approach is called for when real public interest is anticipated or desired and may be supported by a wide range of PA products and activities. Examples include NATO's engagement in Afghanistan, deployment of the NATO Response Force (NRF), and major field exercises. ‘Open House’ type activities also fall into this category.

(2) **Active.** Routine effort will be invested to promote public awareness; the range and scope of information products or support activities are generally limited. This approach may be used when the activity is expected to have some audience interest, or where the public affairs return on investment given the time and resources expended is expected to be modest. An example is a minor field exercise.

(3) **Reactive.** Efforts are not made to promote wide awareness, but a PA plan and media lines may be developed in anticipation of media or public queries. As such, being reactive still means being responsive to queries; not answering the phone or saying “no comment” are not options. A reactive approach could be used when little to no public interest is anticipated; where operational security, policy, privacy, propriety or higher guidance indicates that an active approach is not appropriate; or when full disclosure is not yet possible. It should be noted that a reactive PA approach can damage NATO’s reputation and credibility if this approach is used to attempt to cover up operational errors, lack of success, wrongdoing or other shortcomings.

d. Military PAOs and all military commanders speaking to the media should do so “on the record”. Military personnel are responsible for comments that they make to the news media and should seek prior approval before granting interviews. Where the situation does not permit prior approval, military personnel will alert PA staff regarding any interviews as soon as possible following the activity. Military personnel will not conduct interviews anonymously or provide information to media “off the record” without permission of the Chief Public Affairs Officer (CPAO) at SHAPE.

e. NATO Military personnel and civilians may generally speak to media regarding their roles, missions, and tasks, but such engagements should be coordinated with the relevant Public Affairs Office whenever possible. They will not offer their personal opinions on Alliance policies or procedures, nor shall they comment regarding topics of a political or national nature to the media. Under no circumstances shall sensitive or classified information be released to the media. If this is done inadvertently, the chain of command and Public Affairs Office must be informed immediately.
1-6. **Strategic Communications in NATO and ACO**

a. In concert with other political and military actions, NATO Strategic Communications (STRATCOM) is used to advance NATO's aims through the coordinated, appropriate use of Public Diplomacy, Public Affairs (PA), Military Public Affairs, Information Operations (Info Ops) and Psychological Operations (PSYOPS).

b. Overall STRATCOM direction and guidance is generated by NATO HQ and is political-military in nature. To ensure effective alignment of ACO StratCom activities at all levels, particularly during operations, Chief STRATCOM and the StratCom advisors at other commands are responsible to SACEUR and their respective commanders for the coordination of military PA, Info Ops, and PSYOPS in order to advance NATO's aims and operations.

c. In addition, StratCom, to ensure the consistency of themes and messages, coordinates communication capabilities and synchronizes them with lethal and non-lethal effects in order to influence the opinions and behaviour of selected audiences by demonstrating NATO/ACO's power and will to succeed. Overall, by ensuring information and communication aspects are placed at the heart of all levels of policy, planning and implementation and are a fully integrated part of the overall effort, StratCom can support the development of practical strategies that make a real contribution to operational success.

1-7. **Military PA Relationship to Other Information Functions**

a. As outlined in MC 0457/2, military PA and Info Ops are separate, but related functions. They directly support military objectives, counter adversary disinformation and deter adversary actions. They both require planning, message development and media analysis, though efforts differ with respect to audience, scope and intent. Info Ops is a military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other NAC approved parties in support of Alliance mission objectives. Military PA is not an Info Ops discipline. While coordination is essential, the lines of authority will remain separate, the military PA reporting relationship being direct to the commander. This is to maintain credibility of military PA and to avoid creating a media or public perception that PA activities are coordinated by, or are directed by Info Ops.

Beyond coordination of efforts, messages and staying informed of these activities, military PA will have no role in executing other information activities.

b. PA is distinct from other information/communication disciplines in that:

1. PA transcends the theatre of operations - PA speaks to theatre, regional, international, and member-nation audiences.

2. PA is conducted continually through the war-peace continuum.

3. PA is targeted at both internal and external audiences.
(4) PA is the only function that is mandated to communicate through the news media in an official capacity.

1-8. *Relationship to Nations.* There is a special relationship between nations assigning troops to ACO missions and NATO’s military PA efforts. It is understood that nations have their individual national political and operational imperatives, but it is in everyone’s interest that NATO and the nations say the same thing regarding missions, activities and incidents. As such, PAOs will coordinate with appropriate national military authorities to coordinate messaging as required. Liaison at the highest levels, such as with a nation’s Ministry of Defence (MOD), should occur through the NATO Public Diplomacy Division (PDD) at NATO HQ in Brussels. This can be arranged through ACO PAO at SHAPE. NATO PDD and SHAPE PAO provide relevant information such as master narratives, media lines and imagery to nations on a regular basis. Nations should likewise provide their relevant documents to NATO and ACO for passage to subordinate formations.
CHAPTER 2 – MILITARY PUBLIC AFFAIRS ORGANISATION AND RESPONSIBILITIES

2-1. General

a. Military PA is an essential military asset for commanders at all levels. Therefore, the military PA structure in ACO should be robust enough to foresee events or issues of public impact, plan for efficient application of PA principles and functions, and to coordinate and execute external and internal communications and community relations in support of NATO's plans and operations.

b. The military PA function at each level of command is directly responsible to the commander/command group and may not be further delegated or subordinated to any other staff function below the command group.

c. The CPAO at every level of command in ACO is responsible to the commander and should be responsive to guidance and advice from the SHAPE CPAO.

d. To respond effectively in a timely manner, while attempting to keep up with the very fast pace at which media are working, it is of primary importance that PAOs maintain direct contacts with each other at all levels of authority to effect immediate information sharing and coordination. The PAO, in addition to remaining integrated within the organisation laterally, must also integrate into the vertical command structure. As such, he/she should maintain frequent communication, both up and down the formal organisational PAO hierarchy, called PA technical network (PA TechNet). This network is a non-official and non-restrictive communications network used by all PAOs to reach each other across NATO. It is also a strategic asset for PAOs and commanding officers. Often, information is passed through these networks much faster than the traditional operations command and control chain and can be very useful to not only the public affairs practitioners, but also the command and staff members. It provides assistance, advice, support, and effective coordination. While there is no direct chain of command in the PA TechNet, there are lines of communication from ACO PAO at SHAPE, through subordinate HQs to static and deployed ACO units under SACEUR's command.

e. The execution of military plans will, in many cases, require the deployment of PA personnel from various levels of the NATO Command Structure (NCS) in order to establish NATO Media Information Centres (NMICs), conduct PA activities on the ground or to augment PA staffs that are currently engaged. Every PA office within ACO must anticipate requirements and be prepared to assist other NATO PA activities, both within and outside NATO's traditional area of responsibility (AOR). The priority of effort should always be to support operations. Routine communications activities and responsibilities should never preclude PAOs from being deployed to operational activities. Commanders at all levels are to facilitate the deployment of PAOs to support operations whenever possible.

2-2. Organisation

SHAPE and each ACO subordinate headquarters must include in their organisational structure a PA office. That office must be manned and equipped to perform the tasks and responsibilities found in this directive and Reference E.
2-3. Responsibilities for PA in ACO are as follows:

a. **General.** Commanders and staffs must communicate with the internal and external publics of NATO and non-NATO nations in order to increase public understanding of the Alliance’s objective and missions. The commander is responsible for communications and sets the tone for all supporting activities. Public Affairs is to be considered during all stages of operational planning and efforts to be made to communicate to internal and external audiences regarding all aspects of NATO operations and activities, unless precluded by operational security regulations. This includes the declassification and release of operational imagery in support of PA objectives whenever possible.

b. **SACEUR** is the principal military spokesperson for NATO operations.

c. **SHAPE CPAO** is SACEUR’s principal public affairs advisor and designated spokesperson. The CPAO will assign his/her resources in order to conduct the following tasks:

1. Develop and promulgate to subordinate commands PA guidance, as well as PA plans, including objectives and policies in accordance with guidance received from NATO HQ and SACEUR.

2. Participate in the operational planning process and in battle rhythm meetings in support of operations.

3. Ensure that StratCom guidance and the commander’s intent and direction is reflected in the PA annexes of all SACEUR-origination OPLANS, Contingency Plans (CONPLANs) and appropriate Support Plans (SUPPLANs).

4. Plan and coordinate PA involvement in the deployment phase of ACO subordinate commands and Combined Joint Task Forces (CJTF).

5. Inform and advise SACEUR, the SHAPE Command Group (CG) on all aspects of PA activities and public/media opinion/trends including possible implications of military activity.

6. Prepare and coordinate the clearance and approval of military PA products, including news releases about ACO operations and activities, release approved information to the public.

7. Collect, review, summarise and analyse public/media opinion/trends of news items/reports from periodicals and wire services on a 24-hour, 7-day basis. Monitor radio and television broadcasts.

8. Participate in ACO STRATCOM groups and meetings (as per Annex B to Reference B) to ensure that PA actions, plans and objectives are coordinated as part of the broader STRATCOM effort. Liaise with Info Ops and PSYOPS functions under the auspices of the Chief STRATCOM in order to coordinate with these activities.
(9) Maintain liaison with PA staff at NATO HQ, IMS, NATO Command Structure (NCS), NATO Force Structure (NFS) HQs, HQs deployed in support of operations, and other relevant organisations such as the United Nations (UN), European Union (EU), Organisation for Security and Cooperation in Europe (OSCE) and any European force deploying under NATO Command.

(10) Plan, coordinate and direct major cross-regional PA activities in ACO.

(11) In coordination with the Military Partnership Directorate, develop and promulgate policies and procedures for ACO PA activities in support of partner nations and other cooperative issues.

(12) Provide assistance to news media representatives covering ACO issues and activities.

(13) Conduct news briefings on military-related issues and events of public interest as required.

(14) In conjunction and coordination with SHAPE Protocol and Conference Services Branch and other appropriate SHAPE staff, organise and conduct as Outreach activities unclassified briefings/discussions about ACO and its operations for approved stakeholder visits to SHAPE, and provide them with pictures for international or national media coverage.

(15) Serve as the proponent for standardisation of manning, equipping and training, throughout the ACO PA community for effective PA in peacetime, tension, crisis and conflict.

(16) Advise and assist the International Coordination Cell (ICC), as required, concerning media and PA/opinion issues.

(17) Provide media training as required to ACO commanders and designated spokespersons in conjunction with ACT PA.

(18) In times of crisis, ACO CPAO at SHAPE will:
    
    (a) Establish a PA presence within the SHAPE Comprehensive Crisis and Operations Management Centre (CCOMC).
    
    (b) Conduct media relations activities from the ACO headquarters’ NATO Media Information Centre (NMIC).

(19) Develop policy and procedures for release of information to the public via the Internet.

(20) Promulgate the Annual ACO PA Plan.

(21) Maintain the ACO imagery database.

(22) Ensure that proper information/document management archival practices
are in place in accordance with applicable NATO directives.

d. **SHAPE Deputy Chiefs of Staff (DCOS's)** will:

(1) Support the accomplishment of ACO's PA mission and activities by assisting the PA staff in developing talking points/media response lines (MRL), and by making 'subject matter experts' available for background sessions, briefings, panels, question and answer (Q&A) sessions, and other contacts with media representatives and public groups.

(2) Ensure that CPAO is integrated into the strategic planning process for ACO's mission and operations, and that information is made available to the ACO headquarters PA staff in a timely manner.

(3) Ensure adequate resources are assigned to the PA function to allow mission success.

(4) Ensure that every reasonable effort is made to declassify imagery whenever possible to support the accomplishment of PA and STRATCOM objectives, particularly during operations. The ACO Directive on Imagery, signed by SACEUR, provides the guiding principles regarding the declassification and exploitation of imagery in support of ACO aims.

e. **NATO Command Structure** CPAOs, are their commanders' strategic and tactical PA advisors. They will:

(1) Comply with PA policies, guidance and procedures established by ACO CPAO.

(2) Develop and promulgate to subordinate commands PA policies, objectives, guidance and procedures, which supplement and reinforce those established by ACO CPAO.

(3) Ensure that these policies, procedures, and requirements are reflected in detail in OPLANs, CONPLANs and SUPPLANs.

(4) Inform and advise their commanders and staffs on all aspects of PA activities as well as PA aspects of operations.

(5) Participate in the command group planning process.

(6) Work with StratCom advisers and coordinate appropriately with all the information disciplines.

(7) Gather and prepare information about NATO Command Structure activities and release approved information to the public in support of the commander's mission.

(8) Maintain liaison with ACO CPAO and subordinate PA organisations, plus national PA authorities within their region and with the EU, OSCE, UN and Non-
Governmental Organisations (NGO) as appropriate.

(9) Inform their higher PA TechNet organisation immediately regarding significant events, planned PA activity, and noteworthy media queries.

(10) Test their policies and procedures, as well as ensure training of appropriate exercise players in ACO-wide and JFC/CC CPXs.

(11) In coordination with SHAPE PA staff, ensure that sufficient, qualified PA personnel and equipment are available at each level of command in the NCS to conduct effective and efficient PA activities on a continuous, sustained basis. Keep ACO CPAO informed of actions taken to obtain necessary PA personnel, equipment and funding.

(12) Organise and conduct unclassified briefings for public groups in order to contribute to the success of the commander’s mission.

(13) Provide assistance to news media representatives covering JFC/CC issues and activities.

(14) Act as delegated spokespersons for their commanders.

(15) Provide SHAPE PAO staff with daily summaries and analyses of significant regional news items on NATO/ACO issues and activities, and provide public/media opinion/trends as information becomes available.

(16) Develop and coordinate PA activities, policies, Initial Exercise News Releases (IENR) and PA operations in support of NATO Command Structure exercises.

(17) Serve as the proponent for manning, equipping, training, and budgeting requirements and priorities throughout the respective JFC/CC PA community. Ensure appropriate staffing, communications/word processing/audio-visual compatibility and redundancy, and budget allocation for effective PA in peacetime, crisis periods and conflict.

(18) In times of crisis, JFC/CC will:

(a) Establish a PA cell in their HQ crisis management office or similar organisation upon its activation.

(b) Submit initial and follow-on PA Situation Reports (SITREPs) to SHAPE CPAO.

(c) Ensure that PA data is included in JFC/CC Assessment Reports (ASSESSREPs) when required.

(d) Be prepared to assume PA responsibility for forces coming under JFC/CC operational control.
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(19) Develop and maintain a web and social media presence in compliance with Reference C and E. Supervise and coordinate regional release of information through the Internet.

(20) Provide still and video imagery to the ACO imagery database on a continuous basis.

(21) Propose inputs to the ACO PA Plan.

f. Operations. A designated CPAO for an operation is the primary advisor to the commander for all the PA activities of the command. He/she controls and directs the activities of the NMIC through the NMIC director. He/she provides PA guidance to subordinate formation and unit PAOs upon transfer of authority (TOA).

g. National Authorities

(1) Upon receipt of SACEUR's Request for Activation of national forces, nations should notify SACEUR and appropriate higher HQs in advance of release of any information regarding the activation, deployment or employment of those forces.

(2) Upon transfer of national forces (either in-place forces or external reinforcements) to SACEUR's operational command, national authorities should:

   (a) Ensure that responsibility for PA activities relating to the operations of those forces is transferred to SACEUR simultaneously.

   (b) Coordinate with and support SACEUR's PA policies and activities when pursuing national PA activities related to those forces, including the use of NATO Standard Operating Procedures (SOP) as outlined in this document, References A, B and E of this Directive, and other guidance as promulgated specifically for missions.

   (c) Ensure the timely implementation of applicable plans to augment/support ACO PA organizations with personnel, facilities and equipment as specified in PA annexes of CONPLANs (Annex TT).

h. Commanders of Forces under SACEUR's Operational Command will:

(1) Comply with ACO military PA policies, objectives, guidance and procedures.

(2) Provide PA liaison personnel and other resources as specified in PA annexes of appropriate OPLANs (Annex TT).

(3) Ensure that the organic PA assets of their forces are available to support ACO PA activities.

i. Individuals serving in ACO are required to contact, cooperate and coordinate with their ACO PA office before making any written or oral presentation to the media or
general public on ACO/NATO topics. Such policies, whether set by a participating nation or a mission HQ, shall be as open and transparent as possible, the aim being to maximise the flow of information to the public.

2-4. Transfer of PA Responsibility for Forces Transferred to SACEUR's Authority

a. Until nations transfer authority to SACEUR for their forces, the planning, coordination and conduct of PA actions relating to these forces will remain a national prerogative. ACO PAOs should never comment on specific contributions of/ by any particular nation, unless specifically approved by the nation.

b. When authority for these forces is transferred to SACEUR, SACEUR will simultaneously assume responsibility to plan and conduct PA actions that relate to the military operations of these forces. This will be done in coordination with the nations concerned. At Transfer of Authority (TOA), forces are assigned to NATO formations or HQs, those commanders will assume these responsibilities.

c. In order to effect the transfer of PA responsibility for forces coming under SACEUR's command at TOA, ACO and national PAOs should be familiar with the methods by which authority is transferred and with the timing of transfer.

d. For certain contingencies, particularly those involving SACEUR's Strategic Reserves (SR), when operational command of forces is transferred to SACEUR prior to the arrival of forces in their employment areas (e.g. the forces initially stage in locations outside their eventual employment areas), SACEUR will retain PA responsibility until such forces are committed or assigned to a NATO mission/HQ.
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ACO STRATEGIC COMMUNICATIONS

REFERENCES:
C. IMSWM-0051-2011(SD1), NATO Strategic Communications Military Capability Implementation Plan (CIP), dated 21 April 2011.
F. MC 402/1, NATO Military Policy on Psychological Operations (Final), dated 17 April 2003.
H. IMSM 0348-2011, Terms of Reference NATO HQ StratCom Cell, dated 7 July 2011.


2. **Purpose.** To provide guidance on the planning and conduct of Strategic Communications within ACO.

3. **Applicability.** This directive is applicable to all ACO headquarters/units to be used for the preparation of local directives.

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Non-Sensitive Information Releasable to the Public

4. **Supplementation.** Supplementation is authorised. Proposals for supplementation should be submitted to the SHAPE Strategic Communications Advisor.

5. **Publication Updates.** Updates are authorised when approved by the Director of Management (DOM), SHAPE.

5. **Proponent.** The proponent for this directive is SHAPE Special Staff (SPS) Strategic Communications Advisor (STC).

FOR THE SUPREME ALLIED COMMANDER, EUROPE:

[Signature]

Gintautas Zenkevicius
Brigadier General, LTU Army
Director of Management
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CHAPTER 1 - BACKGROUND

1-1. The Information Environment. ACO is operating in an era in which the role of information is critical to success, and is still evolving in rapid and often unpredictable ways that require imagination and flexibility to respond effectively. All of the challenges facing NATO have a critical information component, whether it is countering our opponents’ use of information, or working to sustain the support of our publics and opinion leaders by ensuring they fully understand what is being done in their name. Changes in the global information environment offer both opportunities and threats to NATO and potential adversaries who see it as a vital part of asymmetric warfare. Responding to contemporary information challenges will consequently require bold reform of structures, working methods, and mindsets. The information age, with its cheap, accessible technology has blurred the distinction between actors and audiences, observers and participants, reporters and reported. Perception of events, whether accurate or not, shape responses and become the future reality, with the information arena becoming ever more crowded and competitive. Maintaining credibility, closing the ‘say-do’ gap and seeking to integrate more closely lethal and non-lethal activities in pursuit of its goals and objectives, remains a significant challenge for NATO. Indeed, such is the importance of information to mission success that, on occasion, policies and actions may need to be adapted in response to the imperatives of achieving the information aspects of the overall objectives.

1-2. NATO Strategic Communications. NATO addresses the challenges of the information age with the various information disciplines covered under the umbrella of Strategic Communications (StratCom) which is defined as:

"... the coordinated and appropriate use of NATO communications activities and capabilities - Public Diplomacy, Public Affairs (PA), Military Public Affairs, Information Operations (Info Ops) and Psychological Operations (PSYOPS), as appropriate - in support of Alliance policies, operations and activities, and in order to advance NATO's aims."

1-3. NATO StratCom is led by NATO HQ and is political-military in nature but to ensure effective coordination there is a role for StratCom at all levels. NATO’s StratCom Policy identifies the central role StratCom plays throughout all phases of operations, from planning to execution. NATO StratCom is a broad-based endeavour, reliant on the contributions of all levels of command within the Alliance, and where appropriate the support of Allies and NATO’s partners. StratCom will be consistent with the relevant NATO policies, MC 422/3 on Information Operations, MC 402/1 on Psychological Operations, and MC 457/2 on Public Affairs, which highlight the need for co-ordination between all elements of the information community.

1-4. ACO and ACT are responsible for the development of capabilities to enable it to deliver the information and communication effects provided by Military Public Affairs, Information Operations (Info Ops) and Psychological Operations (PSYOPS). Their activities must be planned and executed within the context provided by the overarching StratCom approach, and integrated vertically and horizontally with each other and between headquarters and formations.

ACO is responsible for synchronising military lethal actions, with non-lethal military and non-military activities. Hence, the ACO StratCom definition is:

“In cooperation with NATO HQ, the coordinated and appropriate use of Military PA, Info Ops and PSYOPS which, in concert with other military actions and following NATO political guidance, advances NATO’s aims and operations.”

1.5. StratCom Purpose. The purpose of StratCom is to make a major contribution to Alliance success through gaining and maintaining understanding and support for NATO/ACO and its operations, particularly among NATO nations, partners, and with relevant international and local actors within our areas of interest and operations. In addition, StratCom coordinates communication capabilities and synchronises them with lethal effects in order to influence the opinions and behaviour of selected audiences by demonstrating NATO/ACO’s power and will to succeed. Moreover, in order to ensure the consistency of themes and messages vital to maintaining credibility, StratCom will provide oversight and facilitate interaction and mutual awareness among the various information disciplines as they deliver their effects.

1.6. StratCom must also encourage and facilitate the longer-term perspective and strategic thinking which can be undermined by the intense pressures of a daily media environment that can produce a reactive rather than proactive approach. Overall, by ensuring information and communication aspects are placed at the heart of all levels of policy, planning and implementation, and are a fully integrated part of the overall effort, StratCom can support the development of practical strategies that make a real contribution to operational success.

1.7. StratCom Process. In addition to its coordinating function, NATO regards StratCom as a process and a mindset rather than a capability. A process is commonly defined as a series of actions intended to achieve an end. However, processes are not automatic, and need direction and management. In this context, the role of StratCom is that of ‘process owner’, requiring StratCom staff and structure to ensure the process stays on track. This will involve active participation in planning and setting objectives and effects, aiding operators to work together and removing barriers to effective cooperation, encouraging strategic and long-term perspectives, assessing performance and seeking to improve both process and outputs.

1.8. StratCom Mindset. The value of information effects in operations has not always been well appreciated. The StratCom mindset can be defined as where all those involved in operations routinely understand that StratCom has an important role as one of the basic requirements to achieve success in missions and operations. As such the question then becomes not whether to use information effects, but how to best use them.

1.9. As with other specialist areas (whether lethal or non-lethal), this does not mean commanders, operators or planners should be expected to have the expertise to instinctively exploit the potential benefits of StratCom, and so require appropriate staff support to ensure they make best use of it. This will help facilitate understanding and exploitation of the contribution of StratCom to maintaining alliance cohesion at difficult times, the power of narratives, the linkage between verbal and non-verbal messaging, taking account of cultural aspects in policies and actions, the need for consistent and sustained themes and messaging at multiple levels, the key role of senior leadership in StratCom.
CHAPTER 2 - ROLES & RESPONSIBILITIES

2-1. Introduction. In accordance with NATO StratCom Policy\(^1\), the Assistant Secretary General for Public Diplomacy (ASG(PDD)) has overall responsibility for StratCom on behalf of the Secretary General. ACO is a key stakeholder in the development of StratCom policy, directives and associated products, and is responsible for the coordination of military PA, Info Ops and PSYOPs activities in support of operational effects and NATO’s StratCom objectives. In addition, ACO leadership has a critical role to play in engaging selected audiences and promoting NATO messages.

2-2. NATO HQ. NATO HQ\(^2\), closely supported by ACO, is responsible for leading development of NATO-wide StratCom direction and guidance and for its promulgation to the military chain of command. Thereafter, NATO HQ is responsible for overall coordination of StratCom efforts including planning and execution phases of operations, missions and other activities. This process is supported by various bodies and working groups:

a. **StratCom Coordination Cell (SCC).** Provides a permanent focal point for StratCom issues within NATO HQ. The SCC is staffed by personnel from NATO HQ IS and IMS, supported as required by ACO and ACT StratCom staffs. The SCC provides direct staff support to the StratCom Policy Board and its subordinate bodies.

b. **StratCom Policy Board (SCPB).** Chaired by ASG(PDD), is scheduled to meet at least quarterly and is the top-level, cross-divisional, political-military body guiding development of StratCom within NATO. Core membership of the SCPB is at the ASG-level, along with the NATO Spokesperson, Secretary General’s StratCom Advisor, IMS Public Affairs/StratCom Advisor (PA&SCA), ACO’s StratCom Advisor and Chief PAO, and ACT’s StratCom Advisor and Chief PAO. Joint Force (JF)/Component participation may be requested for discussion of specific topics.

c. **StratCom Working Groups (SCWG).** Staff-level bodies working on specific topics under the SCPB umbrella to ensure implementation of SCPB guidance. Core membership is at the staff level from the same organisations and Divisions as the SCPB.

2-3. The Command Role. At all levels within ACO, StratCom is a Command responsibility and a Command Group function. Within the NCS StratCom will be in the Staff Advisory Group (SAG) with the StratCom Advisor having direct access to the commander. StratCom provides a cross-divisional coordinating and enabling function on information issues across and between headquarters. Commanders’ StratCom-related communication capabilities shall be developed and carried out within the context of political-military direction and guidance provided by higher headquarters in concert with other military actions.

2-4. SHAPE. Within ACO, the SHAPE StratCom Advisor has the lead for supporting the development of political-military direction and guidance, drawing on expertise and input from within SHAPE and from subordinate headquarters and formations as necessary. The SHAPE StratCom Advisor is subsequently responsible for interpreting NATO HQ StratCom direction and

\(^1\) PO 2009/0141, NATO Strategic Communications Policy, dated 20 September 2009

\(^2\) In the context of this directive, “NATO HQ” refers to all of the StratCom stakeholders within the International Staff (IS) and the International Military Staff (IMS)
guidance, and for providing any further guidance to subordinate headquarters or formations. SHAPE StratCom will therefore operate as a coordinator and catalyst for action. In accordance with SACEUR’s StratCom direction and guidance, the SHAPE StratCom Advisor is also responsible for the coordination of military PA, Info Ops and PSYOPS outputs in support of StratCom aims and objectives; and, for overseeing their execution, in coordination with NATO HQ and subordinate ACO HQs. In addition to the main information disciplines, SHAPE StratCom will ensure coordination and cooperation with CIMIC (Civil Military Cooperation) and CMI (Civil Military Interaction) to improve communications with civil actors. In addition to routine informal contact, the following ACO forums facilitate execution of these tasks.

a. SHAPE StratCom Working Group. Quarterly meetings of the SHAPE StratCom Working Group (SCWG) provide cross-functional oversight of development and implementation of StratCom policy, plans and activities.

   (1) Membership of the SCWG is drawn from the SHAPE divisions, Special Staff elements, NATO Special Operations HQ (NSFHQ) and agencies as required.

   (2) Core membership, in addition to the information disciplines, will include Command Group, INTAF, DOM, J3, J5, J9 (CIMIC/CMI).

b. ACO-Wide StratCom Meeting. A monthly ACO-wide StratCom meeting provides a forum for StratCom staffs at SHAPE and the JF/Component level to discuss current and emerging StratCom issues. NATO HQ and ACT StratCom staffs are also invited to participate to further improve information sharing and coordination among stakeholders. Quarterly, this forum should include representation from CIMIC/CMI, INTAF/PCLAD, OPS and the staff body responsible for KLE (Key Leader Engagement).

c. StratCom Adviser is an advisory member of the COP (Crisis and Operations Panel).

d. StratCom is an earmarked augmentation of the CCOMC (Comprehensive Crisis and Operations Management Centre) for all StratCom related issues.

2.5 Joint Force, Component & Subordinate Headquarters. StratCom coordination and synchronisation occurs at all levels of command and will be staffed to reflect this. At Joint and Component level there will be a StratCom Advisors within the Staff Advisory Group with direct access to the commander, and they must receive adequate staff support to carry out their function. This must not be at the expense of other information disciplines. Within the following guidelines subordinate HQs have flexibility over organising information coordination structures and procedures that are appropriate to their circumstances.

a. Under all circumstances StratCom remains a Command responsibility and a Command Group function,

b. Within subordinate HQs, StratCom should provide:

   (1) StratCom advice to the HQ Command Group.
(2) Subject Matter Expert (SME) support on StratCom to deployed forces under HQ command.

(3) SME support to Higher HQ for StratCom capability development and plans.

(4) Facilitate message alignment and synchronisation throughout the HQ and with subordinate HQs.

c. To ensure synergy between all information disciplines and with other areas, the effective coordination of StratCom processes will require specific mechanisms, structures and personnel with assigned responsibility for StratCom implementation.

d. JF/Component and subordinate headquarters’ StratCom activities are to be coordinated with, and in support of, SHAPE direction and guidance.

e. Staffs from the various communication and information disciplines should as far as possible be co-located or in close proximity. This improves coordination and collaborative working.

f. Those managing StratCom and chairing information coordination boards or similar bodies must have sufficient responsibility and seniority to both ensure the information disciplines work closely together and that other divisions play a full role. Such bodies should operate under the direct authority of the Command Group.

g. Individuals or bodies with responsibility for StratCom activities as defined by the NATO definition should be titled as such. A number of differing titles for conducting what is in effect StratCom have been in use, creating unnecessary confusion.

h. At operational levels in particular cooperation and coordination with CIMIC must receive a high priority. CIMIC is a primary tool of ‘soft power’ engagement with outside actors, and StratCom and CIMIC must work closely together to maximise its communication potential.

i. At operational levels in particular StratCom must ensure that Key Leader Engagement is properly coordinated with the overall StratCom effort.

2-6. The StratCom Approach. The diverse nature of StratCom and wide geographic location of stakeholders, demands innovative working processes and offers opportunities to develop operating practices more in tune with the flat, network structures found both in information era businesses and among potential adversaries. Consequently, within ACO, a strong emphasis will be placed on collaborative working through a Community of Interest approach which provides physical and virtual linkages between relevant stakeholders. In addition, coordination and synchronisation of all communication capabilities are vital to the delivery of StratCom effects. This approach also fits with effective use of the decentralised, mission orientated principles of Mission Command. Furthermore, all ACO HQs should ensure that engagement on StratCom-related issues is established with external organisations and groups which contribute to the delivery of StratCom objectives. For example, in the interest of alignment and efficiency, there
will periodically be a requirement to coordinate NATO/ACO StratCom activities with individual Allies and Partners and (while respecting the sensitivities of many bodies about contact with the military) with non-NATO StratCom stakeholders such as IOs/NGOs (International Organisations/Non-Governmental Organisations).
CHAPTER 3 - STRATCOM PROCESS & PLANNING

3-1. Introduction. The Comprehensive Operational Planning Directive (COPD) articulates, together with the CCOM handbook, the military planning process in response to emerging crises, and identifies the points in the process at which StratCom D&G and/or products are required. StratCom, working through the communication and information disciplines, should encourage and facilitate an enduring and sustained approach, ensuring outputs are linked to strategic and operational aims.

3-2. Analysis of the Information Environment. An assessment of the information environment in which NATO is to conduct operations/activities is essential to inform effective StratCom planning and delivery, involving all of the information disciplines as appropriate, and building upon their existing planning, analysis and assessment capabilities. Analysis of the information infrastructure, the cultural dimension, the key decision-takers and opinion-formers, and NATO’s own capabilities is necessary to plan and execute missions and operations. StratCom planners should leverage all available open-source information, and Knowledge Development capabilities to understand the information environment, potentially supplemented by contractor support. Analysing potential audiences is important as NATO/ACO must communicate to a variety of external audiences, with differing interests and priorities. Those range from conventional media, through IOs/NGOs and academia, to adversaries. External audience analysis and assessment capabilities are critical to the success of this process.

3-3. Narratives. Sustainable support for any institution or campaign is founded on both logic and instinct. NATO’s core narrative must resonate with its audiences, and its operations, missions and activities must be consistent with that narrative. The NATO narrative, of a democratic, multilateral alliance uniting across borders to guard, with courage and competence, against threats to our homes, has not changed. Moreover, the 2010 revision of NATO’s Strategic Concept provided the opportunity and impetus to re-invigorate the NATO narrative and more clearly articulate NATO’s relevance. The development and adoption of NATO narratives, led by NATO HQ and supported by ACO, is an essential component of StratCom planning. In each case, the narrative should be consistent with the core NATO narrative, establishing the link from messages and actions on the ground, to NATO’s values, beliefs and strategic outlook.

3-4. Political-Military StratCom Planning. The SCPB and SCWG provide the main, multi-disciplinary forums in which to discuss and develop political-military StratCom planning guidance. The top-level direction and guidance (D&G) for NATO’s StratCom approach to a given crisis, mission or activity, will be issued by NATO HQ (PDD), ideally in the form of a StratCom Framework document. The framework supports a key aspect of StratCom, to link all levels of command to ensure a coherent effort, appropriate to each level – a kind of ‘golden thread’ from top to bottom. The Framework will articulate NATO’s StratCom Objectives, its Core Message, StratCom Themes, Focus Topics and direction on coordinating StratCom activities. It acts as a basis for more specific action plans. An outline StratCom Framework is at Annex A.

3-5. SHAPE StratCom Planning. SHAPE StratCom will support NATO HQ in developing Framework documents and ensure maximum transparency within ACO during this process to inform and enable parallel planning activity. The themes within the Framework must be interpreted appropriately at the strategic, operational and theatre level. SHAPE StratCom will
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ensure that NATO HQ StratCom D&G is accurately reflected in the Strategic Planning Directive, SACEUR’s CONOPs and SACEUR’s OPLAN. NATO HQ StratCom D&G may also be supplemented by SACEUR. SHAPE StratCom is also responsible for ensuring coherence within the strategic planning documents between StratCom, military PA, Info Ops and PSYOPS.

SACEUR’s primary requirement is the imaginative and active utilisation of the StratCom themes to support development of actions and messages which reach out to, and influence, selected audiences. This will include explanations for and justifications of NATO’s policies and actions, lethal or otherwise, to appropriate audiences. Led by SHAPE StratCom, ACO will also:

a. Contribute to generating themes and messages, ensuring they reflect operational realities on the ground, and are regularly monitored and updated as needed.

b. Identify StratCom opportunities and risks, and develop proposals for their exploitation and mitigation respectively.

c. Pursue the integration of military leadership engagement plans with those of the civil and military leadership in NATO HQ, to maximise message coherence.

d. As needed, develop ACO-level framework documents and other appropriate StratCom tools. This will usually apply to smaller missions and operations of significance to subordinate HQs, but where NATO HQ does not wish to closely engage, such products will nevertheless fit within NATO HQ’s overarching guidance.

3-6. JF/Component HQ StratCom Planning. Actions accompanied by themes and messaging provide the most powerful StratCom effects. Therefore, at the JF/Component level, StratCom planning should ensure a clear linkage between actions and messages. At JF/Component and operational HQs StratCom is also responsible for ensuring that Info Ops and PSYOPS activities are closely synchronised with JF/Component-led military PA activities, within the umbrella provided by NATO HQ, and SHAPE StratCom D&G. Coherence of actions and messages with the StratCom Framework is an essential requirement of planning at the JF/Component level. Key Leader Engagement at the JF/Component level should complement engagement activities at SHAPE and NATO HQ to ensure maximum effectiveness and message coherence. Theatre-specific StratCom direction and guidance will be provided on a case-by-case basis through SACEUR-approved OPLANS, SUPPLANS and Directives.

3-7. Measures of Effect/Assessment. Non-lethal effects are hard to assess, and there are limits to the degree that statistics can measure influence. In addition, lethal effects can generate 2nd and 3rd order influence and non-lethal effects. It is essential therefore to develop the means by which to assess the effectiveness of influence activities – on both opinions and behaviours of targeted audiences – in order to maximise their impact and to enable NATO to adapt messages and the means of delivery. In this area, there is a place for both objective and subjective analysis. In addition to assessing the impact of individual messages and/or actions, there is a requirement to assess the overall progress of NATO’s collective StratCom approach. This requires a long-term approach with an acceptance that reliable results, if measurable, may only be visible over the long-term. The overall assessment should be held at the highest practical level and, fully utilising existing expertise and capabilities based on the aggregate input of all involved headquarters and formations.
CHAPTER 4 - DELIVERING EFFECTIVE STRATCOM

4-1. Coordination. In the information environment seemingly tactical events can have strategic impact, so, close coordination within and between headquarters is essential during the execution of StratCom responsibilities. Equally it is important to integrate non-lethal activities with lethal actions and ACO headquarters will establish appropriate coordinating mechanisms to achieve this. In order to provide a framework for coordination at the higher levels, a number of routine coordinating activities have been established (see Annex B). In addition to internal coordination, there is a need to maximize theme and message coherence across the Alliance and its Partners, to avoid public differences between NATO as a body and individual member nations. External coordination will be led by NATO HQ, supported by ACO as appropriate.

4-2. Engagement and Empowerment. The dynamic nature of the information era requires that ACO adopts a multi-faceted engagement process. Effective communication requires interaction, highlighting the need to listen as well as speak. In addition to managed engagement activities, specifically by senior leadership, nominated spokespersons and subject matter experts, ACO staff must be empowered to engage appropriately. Empowerment will amplify ACO messages and extend audience penetration. Traditional and Internet-based information technologies must be utilised to maximise the impact of this new approach, and the associated risks actively managed by senior leaders. In this manner, ACO can transition away from a ‘one to many’ communications posture towards a ‘many to many’ engagement approach.

4-3. Technology. Traditional print, radio and television media continue to be vital, but Internet-based information technologies are increasingly dominant. These technologies are developing in rapid and often unpredictable ways that present conceptual, organisational and resource challenges. These technologies offer potential new ways of engaging with existing and/or new audiences such as the younger generation where developing and utilising social media venues facilitate substantive discussions between young military members and their civilian counterparts. Guidance on the use of social media within ACO is provided in ACO Directive AD 95-3.\(^4\) To meet this new challenge ACO will respond on two levels:

a. Intellectual and organisational. ACO must create adaptable structures, and embrace innovative processes such as collaborative working, staffed by empowered individuals who are encouraged to be creative in responding to this changing environment.

b. Resourcing. ACO must fund, equip and train to stay abreast of, and exploit, both traditional and new media.

4-4. Capability Development. The NATO Strategic Communications Military Capability Implementation Plan (CIP)\(^5\) provides the roadmap within which StratCom capability development will be taken forward within ACO, in close cooperation with ACT and NATO HQ. The CIP covers doctrinal development, process development, and StratCom education and training issues.

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\(^4\) ACO Directive (AD) 95-3, Social Media, dated 3 December 2006.

\(^5\) IMSWM-3651-2011(SD1), NATO Strategic Communications Military Capability Implementation Plan (CIP), dated 21 April 2011.
4.5. **Education & Training.** While ACT will lead on StratCom capability development, including specific education and training initiatives, ACO has a critical role to play in setting the requirements for the StratCom function and, as appropriate, supporting all the information disciplines. In addition, ACO StratCom staffs (along with NATO HQ staff where appropriate) at all levels will make a significant contribution to raising StratCom awareness within their own HQ and with external audiences, and in supporting the delivery of formal ACT-led StratCom education and training events. The effective creation of a StratCom ‘mindset’ requires that commanders, planners and operators understand the potential and limitations of StratCom and how best to use it. Led by SHAPE StratCom, ACO, working with ACT, will put a high priority on generating and maintaining this awareness. Led by SHAPE StratCom, ACO will also work with ACT in putting a high priority on supporting the increasing professionalisation of all the information disciplines, in order to ensure commanders, operators and planners receive the expert advice they need and have the tools required to implement effective information campaigns.
OUTLINE STRATCOM FRAMEWORK

1. The StratCom Framework for major operations, missions or activities will be issued by NATO HQ (PDD) to provide top-level D&G for all associated NATO Public Diplomacy, PA, military PA, Info Ops and PSYOPS planning and activities. The purpose of a framework is to provide overarching guidance common to all in order to generate a ‘golden thread’ linking top to bottom. Each level of command will then create more specific messaging and implementation plans that are appropriate to their circumstances. For smaller operations, missions or activities subordinate HQs can generate their own frameworks, provided they are coordinated with SHAPE StratCom. The exact content of the framework will be dependant on the specific requirements of the operation, mission or activity, but it will routinely adopt the following format:

   a. **Introduction.** A brief background to the issue giving political and operational context and outlining future challenges from a StratCom perspective.

   b. **Aim.** The scope and duration of validity for the StratCom Framework.

   c. **StratCom Core Message.** Brief core message to underpin the StratCom approach to be adopted.

   d. **StratCom Objectives.** NATO’s StratCom objectives for the operation, mission or activity. Objectives will routinely refer to friendly, neutral and adversary audiences.

   e. **StratCom Themes.** The (3-5) themes which are to be promoted in support of achieving the StratCom objectives. The themes are not messages _per se_, but are intended to identify the key understandings among audiences that NATO’s integrated messaging and actions will seek to achieve.

   f. **Focus Topics.** Designed to complement StratCom Themes and to identify specific activities and/or calendar events around which focused StratCom action should be considered.

   g. **Coordination.** An overview of the key roles and responsibilities of specified headquarters in delivery of the StratCom approach.

2. Additional annexes can be attached as required, concentrating, as highlighted above, on more specific issues and implementation of the objectives, themes, and topics. Those can include:

   a. **Implementation plan.** Using the framework guidance, specific actions appropriate to different levels of command should be developed to achieve the required effect. This can range from requirements for products and outputs to liaison mechanisms and detailed coordination.
b. **Key Messages.** Although key messages will usually be issued at the time of framework promulgation they are likely to change in response to developments, whereas the Themes and Focus Topics are unlikely to change in the short term. Periodic revision and re-issue of the Key Messages, or the development of a mission-specific RQing Brief, will ensure that all stakeholders have up-to-date messaging available.

c. **Risk & Opportunities.** Attached as an annex setting out the key StratCom challenges and opportunities, with appropriate actions for their mitigation or exploitation.
ACO STRATEGIC COMMUNICATIONS COORDINATION

1. **NATO StratCom Policy Board (SCPB)**. Chaired by ASG PDD and meeting quarterly. SHAPE StratCom Advisor, SHAPE CPAO, ACT, JFC/Component representatives (as required).

2. **NATO StratCom Working Groups (SCWG)**. Co-chaired by ASG PDD and Secretary General’s StratCom Advisor, and formed as needed to deal with specific topics. ACO represented by SHAPE StratCom Advisor, SHAPE CPAO, JFC/Component representatives (as required).

3. **ACO-wide StratCom Meeting**. Chaired by the SHAPE StratCom Advisor and meeting monthly. Membership of:
   a. SHAPE: StratCom, PAO, Info Ops, PSYOPS.
   b. JF/Components (routinely by VTC): StratCom Advisors, PAO, Joint Effects and Influence Branches (JElB).
   c. NATO HQ: IS PDD, IMS PA&SCA, IMS Info Ops.
   d. ACT: StratCom, PAO.
   e. At least quarterly CIMIC/CMI, INTAF/FOLAD, OPS, CIMIC, Command Group will attend.
   f. Multinational, NATO-linked Corps with StratCom structures can be invited.

4. **Operations-specific StratCom VTCs**. All significant operations, missions and activities will have regular VTCs involving representatives of the various information disciplines from each relevant level. This is to ensure the whole information community has a full understanding of the StratCom environment in the broadest sense. Such VTCs will also include as needed other HQ representatives.

5. **NATO-wide StratCom Conference**. Held annually in spring/early summer for all StratCom stakeholders within NATO and selected external invitees, including academics, civilian contractors and national representatives.

6. **Annual Operational StratCom Workshop**. Led by SHAPE StratCom, to discuss operational-level issues.
7. **Ad-Hoc StratCom seminars/Working Groups.** Held as required, usually with participation from NATO StratCom stakeholders only, and designed to focus on specific issues/topics.

8. **NATO StratCom Community of Interest.** Sustained engagement, led by SHAPE StratCom, with internal and external StratCom stakeholders.
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HEADQUARTERS, SUPREME ALLIED COMMANDER TRANSFORMATION
7867 BLANDY ROAD, SUITE 100
NORFOLK, VIRGINIA 23518-2260

ACT DIRECTIVE
NUMBER 95-10

3 September 2008

PUBLIC AFFAIRS POLICY

This Allied Command Transformation (ACT) directive will be included in the next publication of the List of Effective ACT Directives Index. This directive supersedes ACT 95-10 Directive dated 23 August 2005.

References:
A. MC457/1 Military Policy on Public Affairs, 14 Sept 07
B. MC456/1 NATO Education, Training, Exercise, and Evaluation Policy, 27 Mar 06
C. ACO Directive 95-1, “ACO Public Information”

1. Applicability. This directive applies to all of Allied Command Transformation, including its subordinate commands and staff elements, hereafter referred to as “the command.”

2. Interim Changes. Interim changes are authorised when approved by the HQ SACT Chief of Staff.

3. Purpose. This directive describes the Public Affairs (PA) responsibilities of ACT commanders, directors, managers, public affairs officers (PAOs), and personnel. It further describes the requirement for all ACT subordinate commands and staff elements to establish or designate a PAO, and to acknowledge ACT PA as the leading agent and senior resource in establishing and operating their PA organisations. In addition, this directive elaborates on key policy aspects of public affairs.

4. Overview. HQ SACT PA is a branch within the Command Group that reports to Supreme Allied Commander Transformation, and advises Deputy SACT and Chief of Staff. It also provides overall guidance for NATO PA policy, doctrine, and training, including oversight of public affairs courses at NATO Education and Training Facilities.
5. Responsibilities

a. **ACT Public Affairs.** ACT Public Affairs is mandated to globally communicate SACT’s vision and messages, and to lead PA activities for the command. PA is also responsible for Community Relations and Internal Communication campaigns and for coordinating all ACT media engagements. PA is a command responsibility of the highest priority. Among the key tasks of the PA branch are:

(1) Act as the senior advisor to the Commander on all public affairs matters.

(2) Facilitate contact with PA officials at other NATO and non-NATO entities as necessary to support the command’s mission.

(3) Coordinate and respond to queries and reports from external media sources to include:

   a. Developing media plans that include themes, messages, and approaches to measure and assess effectiveness;

   b. Researching media outlets and their representatives; and

   c. Providing feedback on media coverage of interest in print, video, and audio products.

(4) Contribute to the coordination of the command strategic engagements and communications efforts.

(5) As resources allow, provide PA training to subordinate commands and PA support to exercises to include:

   a. Developing comprehensive training materials

   b. Providing trained and qualified PAOs/trainers

(6) Develop and maintain command information products, such as:

   a. News articles for Web and *The Transformer* magazine

   b. Web-based audio (“podcasts”) and video (“vidcasts”) news products

   c. Media Advisories

   d. Press Releases

   e. Trifolds, brochures and booklets
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(6) Fact sheets

(7) Other written and A/V products as required

(8) Ensure that all command information products adhere to NATO Visual Identity Guidelines and ACT corporate identity standards.

(9) Manage, oversee and provide contractor and staff instructions for all publicly accessible ACT command web sites, to include guidance on design, architecture, content and maintenance.

(10) Coordinate PA at parallel and higher levels within NATO and the nations.

(11) Facilitate media training of subject matter experts designated to discuss command matters of interest.

(12) Plan and perform command briefer training and certify command briefers.

(1) Perform other PA-related tasks as directed by command group leadership.

b. **PA Manning, Subordinate Commands and Staff Elements.** All ACT subordinate commands and staff elements shall have at a minimum one established or designated PAO. If a peacetime establishment PA post does not exist, or the post is vacant, an officer (OF 2 or higher), senior NCO (OR7 or higher) or civilian equivalent shall be designated as PAO. With regard to a PA post, the following policies will be upheld:

(1) The PAO may not be double-hatted as an Information Operations or Psychological Operations officer, but will in accordance with NATO PA policy MG 457 coordinate with these functions.

(2) PAOs shall report directly to the commander and be granted proper access to senior staff and staff meetings.

(3) PAOs shall be given adequate time and resources to fulfill their PA functions.

(4) PAO advice and guidance shall be sought and incorporated at the earliest possible stages of planning or management issues throughout the organization.

(5) PAO contact information must be forwarded to HQ SACT PAO.

(6) PA personnel shall attend the next available NATO School PA course after being assigned. The HQ SACT CPAO may waive this requirement if the nominee has completed an equivalent, NATO-recognized PA course.

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c. **PA Functions, Subordinate Command and Staff Elements.** PAOs at ACT subordinate commands and staff elements must keep both their commander and HQ SACT PA informed of their PA activities. Specifically, such designated PAOs:

1. Shall work directly with the news media to address inquiries or disseminate information specific to their organisations.

2. In consultation with their chain of command, shall immediately inform HQ SACT PA about any significant events or issues that may attract news media attention.

3. Must inform HQ SACT PA on, and provide copies of, any significant news media coverage in a timely manner – in English if at all possible.

4. Shall provide input and support to ACT-wide internal and external communication vehicles, such as the ACT web site and magazine.

5. Shall ensure that their command has a web site, to include a section for PA-related information and command PA phone and e-mail contact. PAO is responsible for ensuring that the site’s layout is within NATO Visual Identity Guidelines and that content is relevant, accurate, without classification, and up-to-date.

6. **Coordination**

a. **HQ SACT PA.** HQ SACT PA will coordinate with the NATO Public Diplomacy Division Press & Media Section, NATO Spokesperson, IMS PA Advisor, and the Allied Command Operations PAO on a routine basis. During crisis or for special requirements, additional coordination will occur as needed.

b. **Subordinate PAOs.** Subordinate PAOs will inform HQ SACT PA of all routine information activities on a weekly basis via an e-mail report and conference call. HQ SACT PA will promulgate timings for conference calls and reports to include key issues, planned training and education, exercise support, special events, media relations, web developments and requests for assistance/guidance. Subordinate PAOs shall provide 24-hour advance notice if unavailable for the conference call and submit negative responses if nothing to report by e-mail.

1. Subordinate PAOs may co-ordinate with parallel NATO, national, or other PA entities for routine matters. During crisis, if HQ SACT PA is not accessible in a timely manner, subordinate PAOs may liaise with higher levels of command as required, but must keep HQ SACT PA concurrently informed.

2. Where HQ SACT or SACT leadership is to be mentioned in PA products or engaged in PA activities, HQ SACT PA must be informed and consulted well in advance.
c. **Command Personnel.** All personnel will coordinate with PA in regard to the public release of information.

d. **PA Training and Education.** All PA training and education involving ACT organisations, including where acting in support of NATO HQ or ACO, must be coordinated with and validated by ACT PA and must adhere to the Joint Functional Area Training Guide for Public Information.

e. **Requests for Public Affairs Support during Exercises or Events.** All requests for PA support, active or reserve, for any exercise or major event must be coordinated with and validated by ACT PA.

7. **Release of Information.** References A through C delineate information release policies and procedures.

FOR THE SUPREME ALLIED COMMANDER TRANSFORMATION:

[Signature]

Jan Arp
Lieutenant General, Canadian Forces
Chief of Staff

DISTRIBUTION: (HQ SACT DIR 35-1)
Lists I, II, III, IV, VI
ACO DIRECTIVE (AD) 095-003

ACO DIRECTIVE ON SOCIAL MEDIA

REFERENCES:  
B. MC 0457/2(Final), NATO Military Policy on Public Affairs, dated 08 February 2011.  
C. AD 055-002, ACO Strategic Communications, dated 21 May 2012.  
D. AD 055-001, ACO Public Affairs, dated 04 June 2013.  

1. **Status.** This directive is a rewrite of Allied Command Operations (ACO) Directive 095-003, "Social Media", dated 03 December 2009.

2. **Purpose.** To provide guidelines for the military use of social media for military Public Affairs (PA) within ACO in support of peacetime and military operations (see Chapter 3).

3. **Applicability.** This directive is applicable to all ACO headquarters/units and should be used as a guide for the preparation of local directives.

4. **Publication Updates.** Updates are authorised when approved by the Director of Management (DOM), SHAPE.

5. **Proponent.** The proponent for this directive is the SHAPE Public Affairs (PUA) office.

FOR THE SUPREME ALLIED COMMANDER, EUROPE:

[Signature]

Eddy Staes  
Brigadier General, BEL A  
Director of Management

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ANNEXES:
A. Social Media - ACO Comments Policy.
CHAPTER 1 - BACKGROUND

1-1. Introduction

a. Social media\(^1\) gives NATO the ability to quickly and dynamically engage with widespread audiences in an economical and effective manner. It has become an important tool for NATO messaging, outreach, and communication with both internal and external selected audiences. ACO uses a wide variety of social media platforms, which support a range of media types including text, video, audio, and photography. ACO social media enables the entire ACO network, partners and allies across the globe to stay connected and spread NATO themes and messages. Social media is a cheap, effective and measurable form of communication. ACO uses social media to tell the ACO and NATO story, communicate messages and engage in a two-way discussion with social media users. In order to be successful, social media campaigns must be well planned and managed, adequately resourced, flexible, timely, as well as responsive and engaging and aligned with SACEUR's Strategic Communications (STRATCOM) guidance.

b. This directive will provide guidance for ACO units regarding the use of social media platforms for military Public Affairs (PA) purposes as a communications means to enhance NATO's engagement with key audiences and to increase understanding of the Alliance's objectives and activities in support of SACEUR's STRATCOM guidance. The directive distinguishes between peacetime, steady-state social media activities (see Chapter 2) and those conducted during operations (see Chapter 3).

1-2. Key Challenges. With increasing frequency, target audiences are utilizing social media as the primary platform from which to gather information, develop opinions, and become informed on events, issues and news from NATO and its strategic and subordinate commands. This rapidly expanding communications environment provides challenges, vulnerabilities and risks to ACO units that must be regularly assessed and managed. One key challenge is the need to keep informed regarding social media 'discussions' on NATO and global security matters in order to maintain situational awareness. Key vulnerabilities include security concerns and the ease by which information can be transmitted globally using social media tools. The dichotomy between the need for ACO to be aware of and engage in public debate versus security concerns, calls for a measured and managed approach to social media platforms within ACO. Such an approach must be permissive enough to enable effective communications campaigns to be conducted but managed to the extent that security concerns are minimized. The effectiveness of social media campaigns are generally in direct relation to the effort and manpower dedicated to their implementation. Communicators and commanders must therefore consider a number of factors when implementing social media strategies including the allocation of adequate resources, desired communications effects, access limitations, security precautions, and technical considerations.

1-3. Aim. This directive provides guidance for the military Public Affairs’ use of social media during both peacetime (Chapter 2) and operations (Chapter 3) and to recommend best practices for use across ACO platforms.

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\(^1\) Web-based technologies used for social interaction and to transform and broadcast media monologues into interactive, social dialogues.
1-4. Guidance to Subordinate HQs. ACO subordinate headquarters are to adopt this directive and develop their own social media strategy to meet their particular set of circumstances and goals. Commanders are strongly encouraged to embrace and utilize the communication advantages of social media. Operational Security (OPSEC) and personal privacy concerns should be paramount when employing these tools.

1-5. Requirements. As with any communication method, the use of social media must be aligned with ACO's communication strategy, directives, themes, master messages, and STRATCOM guidance. The proper use of social media as an effective communications tool requires clear goals, clear messages and clearly identified audiences. Other key requirements are as follows:

a. Access Requirements. Access to social media platforms is often blocked by ACO computer security staff. If ACO units are to mount effective social media campaigns, access to these platforms must be enabled for commanders and communications staff. Access to social media platforms from selected ACO smart phones should also be considered as a means to more effectively leverage this medium. Access to social media however, must be balanced with security regulations, privacy considerations, and the threat of cyber-attacks and disinformation campaigns. Communications professionals must identify the desired effects of social media, be aware of the liabilities and risks and actively monitor and manage those platforms accordingly.

b. Training Requirements. Ideally, ACO subordinate commands should have a social media cell made up of professional PA staff to run corporate web and social media platforms. Information Operations (Info Ops) and Psychological Operations (PSYOPS) personnel may also be involved in social media campaigns during operations. Training is required to ensure that ACO staff tasked with overseeing and managing social media campaigns and platforms have the required expertise and knowledge to execute their duties. In the first instance, the on-line training course provided by ACT should be utilised and further training should be sought out from NATO member nations or the private sector if required. As well, ACO should seek to harness the skills of existing members that have training and experience with social media by employing them in social media sections. The information above deals with individual training however, collective training skills will be practiced during the TRIDENT series of exercises carried out by ACT.

1-6. Key Military Public Affairs Communications Activities for Social Media Platforms

a. Internal Communication. Social media tools are an effective means to keep internal audiences informed and motivated. ACO has identified 5 primary internal communications activities for consideration when drafting internal strategies:

(1) Communicate the Commander's intent.
(2) Disseminate information to internal audiences in a timely and effective manner.
(3) Communicate ACO key themes and messages to internal audiences.

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(4) Build esprit de corps.

(5) Dispel rumours, control the flow of information and prevent mis/disinformation.

b. External Communication. Social media tools can efficiently communicate to vast and diverse audiences and promote two-way communication and engagement. Objectives: ACO has identified 5 primary external communications activities for consideration when drafting external strategies:

(1) Inform international audiences on the role and mission of ACO.

(2) Communicate ACO key themes and messages.

(3) Promote the operations and accomplishments of ACO units and personnel.

(4) Increase the level of engagement with key audiences.

(5) Dispel rumours, control the flow of information and prevent mis/disinformation.
CHAPTER 2 – ESTABLISHING AND MAINTAINING A SOCIAL MEDIA PRESENCE IN NON-OPERATIONAL ENVIRONMENTS

2-1. Introduction. Social Media related platforms connect and communicate with a wider audience than any other media in history. Facebook alone has almost 1.3 billion users⁴. Over 90 percent of global marketing is conducted through social media. In developed countries, over 50 percent of people receive breaking news from social media and 46 percent of people use social media as their weekly news source. With numerous platforms available, social media provides an ever-expanding tool chest of methods to reach intended audiences. Any refusal to utilize or the misuse of social media can seriously hinder an organization's ability to effectively communicate with both internal and external audiences.

2-2. Develop a Social Media Strategy. SHAPE and ACO subordinate commands should create social media strategies that are synchronised with overall STRATCOM and PA objectives. Social media should be used as a tool to position key themes and messages into the social space. As social media is a two-way conversation, ACO units should create content that informs audiences, engages with them and facilitates feedback. Language should be open, engaging, and interesting. Social media cells should be provided with key themes and messages, along with some guidance and direction, and then given the latitude to engage with audiences in creative, consistent and meaningful ways. Posts to social media platforms must be dynamic and social media staff must have the authority and flexibility to respond and react within established parameters.

2-3. Management of Social Media Sites. In non-operational environments/peacetime, ACO PA staff will manage corporate web and social media platforms on behalf of the Commander. Other entities may certainly have input to content placed on these platforms, but the overall management rests with PA staff. The situation is different during operations and these considerations are covered in Chapter 3 of this document. On the rare occasion where there are disagreements regarding web or social media content and/or strategy, the Commander shall always hold the final authority. A management plan should be established for each platform that clearly designates the following:

- a. Site Administrators: Who will have access and permissions for the platform? Ensure there are multiple administrators to avoid single points of failure.
- b. Objectives: What ACO Communications objectives will be reinforced by communicating on this site?
- c. Selected audiences: Who are you trying to reach using this platform?
- d. Type and frequency of content to be posted: What is important and interesting to your audience? How will you engage them in conversations?
- e. Comment/Engagement Policy: Who is responsible to monitor comments and feedback? Will comments be moderated or automatically posted? What is the policy regarding inappropriate comments?

⁴ Registered users in March 2014.
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1. Transition Plan. When key personnel are posted, how will responsibilities and permissions for the platform be transferred?

2-4. Release Authority. Like any news release, public statement, or any other type of official product, social media posts on ACO corporate platforms are all official and 'on-the-record'. Therefore, all posts shall be subject to an official release process, much like any other form of official release. Care needs to be taken to ensure social media posts are relevant, factually correct and in-line with the Commander's intent and established communications objectives, themes and strategies. ACO PA staff will manage release authority on behalf of commanders for ACO corporate sites operating in non-operational environments/peacetime. The situation is different during operations and those considerations are covered in Chapter 3 of this document. When establishing release procedures, the speed and unique nature of social media platforms must be considered. Social media does not have standard 'business hours'. It operates 24 hours a day, seven days a week. This necessitates streamlined approval processes that facilitate the rapid approval and dissemination of appropriate content to audiences, while it is still relevant and topical. In order to function properly, certain authorities will need to be delegated, alternate approving authorities will need to be designated and guidelines and procedures will need to be clearly understood by involved staff.

2-5. Engaging Audiences. Social media should not be used solely as an outlet to release command messages and information or repeatedly 'share' information from other military organizations. Social media is best viewed as a virtual community. Organizations must engage audiences in two-way conversations that encourage audiences to respond, interact, share and stay interested in ACO/NATO activities. Social media content should consist of an equal balance of command information together with entertainment and fun. Audiences will ignore a social media platform that does not provide the right mix of engagement, entertainment and information.

2-6. Using Social Media as an Open Door. Social media is an extension of communications and PA activities. It is an informal community designed to facilitate conversations between people and audiences across the globe. Units within ACO are therefore strongly encouraged to foster engagement with audiences by encouraging dialogue, developing innovative ways to facilitate interaction, answering questions, responding to comments and soliciting feedback and ideas. Building a rapport with an audience who is involved and engaged can have significant benefits, especially during a crisis. Social media is an excellent forum to dispel rumours, provide needed context and prevent mis/disinformation.

2-7. Enforcing Posting Policy and Monitoring Audience Feedback. Each official social media platform within ACO must have a link to a 'terms of use statement' (see Annex A). This will ensure that users understand the rules regarding what is allowable and appropriate for posting on each site. The statement will also outline the grounds on which a user may be blocked or removed from using or posting on a social media platform. Administrators must also consistently monitor social media platforms to ensure guest content is appropriate, evaluate and respond to any feedback and analyse what topics are most engaging for users. This will allow administrators and communicators to refine and adapt the evolving social media strategy.

2-8. Contact Information. Social media is an ongoing conversation and users must have the means to contact the organization and receive feedback. All ACO platforms must contain
up-to-date contact information that includes an official e-mail address and phone number of the PA office or social media administrator as a minimum. ACO platforms should also contain convenient links to other important sites within ACO as well as the main NATO webpage.

2-9. Measures of Effectiveness. As with all communications activities, ACO units must set objectives for all social media campaigns and establish the means to evaluate progress and refine efforts to better engage audiences. Best practices should be followed to ensure evaluation programs are realistic and meaningful. For example, the number of ‘likes’ or ‘followers’ does not provide a comprehensive picture of a platform’s social media influence. ACO units should also consider levels of participation, engagement, user feedback and the shares/reach of social media content to establish a more complete picture of audience engagement and interaction. There are numerous free analytical tools available online that can provide effective ways of monitoring and evaluating a unit’s social media presence.

2-10. SHAPE Official/Corporate Sites. At SHAPE, SHAPE Public Affairs Office (PAO) will remain the sole entity managing SHAPE’s official/corporate presence on social networking sites. Only SACEUR and designated representatives are authorised to publish to these platforms on behalf of SHAPE; other personnel may do so only in a ‘non-official’ capacity, unless specific approval is first obtained. SHAPE PAO will coordinate with any division or staff entity wishing to communicate via SHAPE on-line platforms. SHAPE PAO currently manages nine social media capabilities; the SHAPE/ACO Facebook and Twitter accounts, SACEUR’s Blog, SACEUR’s Facebook and Twitter accounts, ACO Command Senior Enlisted Leader’s (CSEL) Blog, a NATO NCO Facebook account and a SHAPE Flickr and YouTube account. All of these platforms are aligned and support ACO’s overall STRATCOM and PA objectives. The following sub-paragraphe outlines SHAPE’s current platforms and subordinate commands are invited to adopt a similar approach using the platforms that meet their specific communication goals and are manageable given existing resources.

a. ACO/SHAPE Facebook and Twitter. As the main ACO/SHAPE official/corporate social media presence, these pages are used to engage social media communities in conversations related to our activities and operations while communicating key themes and messages to internal and external audiences. Subordinate commands are strongly encouraged to create and maintain an official social media presence for their own command. Organizations are encouraged to ‘like’, ‘share’ and repurpose posts from SHAPE social media platforms. In turn, the SHAPE PAO will regularly use and highlight information found on the platforms of subordinate commands. Those ACO/SHAPE official/corporate social media platforms are managed on behalf of SACEUR by SHAPE PAO.

b. SACEUR/Commander’s Blog. A blog from the Commander’s perspective is an excellent platform to inform audiences regarding the Commander’s focus, priorities and to highlight other information of note. It is also an appropriate venue to solicit feedback and to engage with interested communities. Subordinate commands are encouraged to create their own leadership blog and/or share SACEUR’s blogs.

c. SACEUR/Commander’s Social Media. SACEUR maintains individual Twitter and Facebook accounts and engages audiences on day to day activities and priorities. Commanders in subordinate commands are similarly encouraged to create an official social media presence. Much like a blog, a social media presence allows for a continual and open conversation with audiences including feedback from users. ACO
organizations are encouraged to ‘like’, ‘share’ and repurpose posts from the SACEUR’s social media pages for use on their own official pages. The SACEUR’s social media pages are managed by the SACEUR and ACO PA staff.

d. ACO Command Senior Enlisted Leader (CSEL) Blog. Much like the SACEUR/Commander’s blog, a blog from the ACO CSEL bring enlisted issues, concerns and information to the attention of the audience. It is appropriate for the CSEL blog to create new content or to reinforce the Commander’s position from an enlisted perspective.

e. NATO NCO Social Media. The NATO NCO Facebook page is a specific effort by the SHAPE PA Office and the ACO CSEL to highlight the accomplishments of the enlisted service members of NATO and promote ongoing development of the NCO Corps within NATO and ACO. Organizations are encouraged to ‘like’, ‘share’ and repurpose posts from the NATO NCO page for their own official pages. The NATO NCO social media pages are managed by the ACO CSEL and the SHAPE PA Office.

f. ACO/SHAPE Flickr Site and YouTube channel. Images and video are powerful assets that can underscore key communications, themes and messages as well as capture the imagination of audiences. Operational imagery is particularly sought after by audiences. SHAPE uses imagery across all social media platforms, but maintaining a catalogue of outstanding images on Flickr and video on YouTube enables both internal and external audiences to find quality imagery on NATO operations quickly and easily. During exercise and operations, photo and video repositories such as these will likely attract more visitors than all other platforms combined. These platforms should always be considered an important part of a social media strategy. ACO/SHAPE Flickr and YouTube platforms are managed by SHAPE PA.

2-11. Personal Sites and Personal Interaction on Public Sites. The distribution of content related to NATO activities by internal members presents challenges and risks pertaining to OPSEC, but also present NATO members with excellent opportunities to distribute useful and compelling information about NATO activities to a wide array of audiences. The key to exploiting benefits while minimizing the risks of social media activity by ACO members lies in effective governance and education of personnel. MC 0475/2, NATO Military Policy on Public Affairs, states that NATO personnel are “advised to consult with their chain of command before publishing NATO-related information and imagery to the internet. The chain of command has expert advisors, such as public affairs and intelligence staffs, who will ensure that such published information is not ultimately prejudicial to NATO operations and personnel.” Commanders and PA staffs should regularly remind ACO personnel of the need to clear content related to NATO operations and activities prior to publishing on private social media accounts. Further, ACO personnel are reminded to exercise caution in offering personal opinion which could be interpreted or misconstrued as an official ACO/NATO position. Opinions on political or policy matters related to NATO should not be expressed publicly by military members. Other personal views should be clearly indicated as personal using a disclaimer such as: “the views, thoughts and opinions offered are personal and do not represent endorsed or official policy.”
CHAPTER 3 – SOCIAL MEDIA ACTIVITY DURING OPERATIONS

3-1. Introduction. The general practices and principles governing the use of social media during operations do not vary significantly whether they are being conducted during peacetime in a corporate construct or during operations overseas. This chapter provides clarification regarding the areas of responsibility and authority regarding social media activity during operations.

3-2. Coordination of Efforts. Additional entities other than PA will be involved in the content creation, posting and approval processes during operations. In order to maximise the desired effects and ensure a consistency and harmony, social media activities must be coordinated. Within each HQ, the commanders will ensure this coordination through existing information environment coordination boards (where all information disciplines are represented) such as, Information Operations Coordination Board, Strategic Communications Working Group and the Information Environment Working Group. Any conflicting issue on the usage of social media which cannot be agreed in these coordination boards will be solved and decided by commanders.

3-3. PSYOPS in Social Media. Unity of effort is essential to achieve consistency of word and action in all operations. National and NATO PSYOPS in a theatre must be closely coordinated to present consistent messages aligned with the NATO STRATCOM guidance to audiences, approved by North Atlantic Council in support of alliance goals and objectives. PSYOPS are generally planned under the authority of the J3/Plans section and executed under the authority of the J3/Operations section. Because of its potential complexity and inherent risks, PSYOPS are planned, conducted and represented on staffs by a special staff element, especially trained in the planning and execution of PSYOPS. PSYOPS activities are incorporated within the normal planning and targeting cycles of a unit and are reflected in the products developed within these cycles. PSYOPS activities in social media will be coordinated through the Info Ops staff function within the existing working groups and boards in the relevant headquarters.

3-4. Official Corporate Sites. Communications platforms that purport to officially represent a NATO command, unit, or mission are to be primarily administered by PA staffs on behalf of the commander and coordinated among all the information disciplines. Other entities may be involved in populating and monitoring these sites, but the overall coordination and responsibility will rest with PA. To that end, any conflicting issue will be handled as per para 3.2. This includes official web sites as well as official social media sites for commands, units and operations. It also encompasses platforms focused on both international audiences as well as local audiences (regardless of the language used) in the theatre of operations. Official public communication, whether via the media or via other tools such as social media, must be consistent, controlled, and carefully coordinated to ensure Alliance credibility is maintained. Official communications have the highest level of risk, which is why a higher degree of management and centralisation is required.

3-5. Implementation. The best-practices for the implementation of social media campaigns do not differ widely between those that are operational and those that are corporate. Therefore, the guidance found in all other chapters of this document is generally applicable to an operational setting as well. There will be obvious variances including language and cultural differences and these will differ greatly depending on the operational context.
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Therefore, it will be imperative that staffs managing on-line communications campaigns have direct access to local interpreters/ translators as well as cultural and communications experts in order to effectively tailor and conduct their campaigns.
CHAPTER 4 – SOCIAL MEDIA OPERATIONAL SECURITY

4-1. Introduction. The use of social media, like any other form of communication, poses risks regarding OPSEC and complacency can lead to OPSEC violations. NATO adversaries are known to scan blogs, forums, chat-rooms and other social media to collect information that may be harmful to ACO operations or personnel. Understanding what may or may not be released via social media will do much to protect an organizations’ online identity and protect OPSEC. Education of ACO personnel and proper management of social media tools are keys to maintaining effective and secure social media campaigns. Outright bans on the use of social media are not the solution, as this would deny ACO from exploiting the numerous advantages these platforms bring in the realm of communications.

4-2. Security Considerations

a. OPSEC is paramount. It is incumbent upon all personnel to consider the potential of creating risk to themselves, their families, their peers and the mission by publishing information to the Internet. Information and/or imagery may individually, or in conjunction with other information, provide insights into current ACO operations, equipment, capabilities, tactics and intentions. Further guidance for individuals on maintaining security online is provided at Annex B.

b. All information that is posted to social media sites must be approved for public release. Knowingly, or unknowingly releasing classified information into the public domain violates specific regulations and could lead to legal and/or disciplinary actions. If there is any doubt regarding the OPSEC implications of posting certain information, social media administrators should consult with PA or security staff.

c. The following OPSEC guidelines should be practiced by all units and headquarters in ACO involved with social media campaigns:

(1) Designate an official social media administrator or administrative team.

(2) Ensure all social media content is approved for release by the proper authority.

(3) Monitor official social media presence and ensure users are not posting inappropriate or sensitive information on the official pages.

(4) Conduct regular social media OPSEC training with the administrative members.

(5) Be vigilant. Once information is posted to social media, your control on dissemination has been taken out.
CHAPTER 5 – TECHNICAL CONSIDERATIONS

5-1. Access. Local bandwidth availability and access to NATO UNCLASSIFIED workstations will influence the degree to which social media can be employed in each headquarters. A priority should be placed in providing all communications practitioners with access to unclassified systems that can monitor and engage in social media activity. When bandwidth issues are constricted to the point where social media access is not feasible, headquarters should consider contracting civilian internet connections for staff tasked with responsibilities related to social media.

5-2. Account Names. Lessons learned indicate that it is a good practice to reserve several account names that are close in syntax to official account names. This prevents ‘hacktivists’ from creating false accounts that attempt to portray themselves as official sites. Only one official account should be used and the remainder can simply point to the official account.
CHAPTER 6 – IMPLEMENTATION

6-1. Introduction. The successful exploitation of social media in support of ACO’s internal and external communications requirements will be dependent on a number of factors. These include, availability/access to appropriate social media tools, familiarity with and confidence in their use, and staff discipline to remain ‘in their lane’ of expertise/responsibility when posting information into the public domain. The value-added for staff participants will vary from post to post and individual to individual. There should be no compulsion to use social media and national restrictions on the use of social media shall be respected. Commanders should seek to encourage authorised staff to determine themselves how they might best exploit the capability, to experiment and innovate and to share their experiences widely (both internally and throughout ACO) to promote the spread of ‘best practices’. By empowering and enabling staff and by harnessing staff creativity and enthusiasm, ACO can gain considerably from the extended use of social media in support of its operational and business outputs. However, the risks associated with expanded use of social media and deeper empowerment of the individual as a communicator requires command acknowledgement and active management.

6-2. Initial Steps. The first step in implementing social media within a unit or headquarters should be to develop a social media strategy that clearly articulates objectives, authorities, resources, tools/methods to be employed and measures of effectiveness. This strategy must be aligned with STRATCOM objectives, the PA communication plans, Commander’s intent, and the overall themes and messages from ACO and NATO. Social media administrators should create a plan that best fits their goals and communicates to the information needs of their particular audiences.

For developing and implementing this plan, social media administrators should:

a. Review social media guidance from NATO, ACO and the subordinate commands. This guidance provides the basic information needed to fully implement a social media strategy. Social media experts working within PA may request the assistance of other personnel that have social media experience to assist with certain tasks.

b. Using the social media platforms that best meet the organization’s goals and needs to create a social media presence. It is best to start with a small number of platforms and execute an effective campaign, rather than to try to have a presence on too many platforms.

c. Register all social media sites with the ACO PA Office Social Media Section.

d. Maintain all social media sites with up-to-date and relevant information by using feedback from the audience and adapting to the Commander’s intent and the organizational goals.

6-3. Measures of Effectiveness. Social media strategies should be regularly reviewed to ensure organizational objectives and audience needs are being met. There are a wide range of metrics that can be analysed and software programmes that can measure various impacts. Do not just focus on total numbers of followers, but rather seek to measure the level of engagement and interaction occurring with audiences. Track increases in followers and
interaction and try to ascertain what factors were behind any increase or decrease in performance. Finally, attempt to tailor your strategy and methodology to incorporate lessons learned and avoid previous mistakes. Personnel employed in social media positions should receive formal training in measuring the effectiveness of online campaigns if practicable. Such training is available via numerous civilian workshops.
SOCIAL MEDIA – ACO COMMENTS POLICY

1. It is ACO policy to allow comments by external users on its social media sites.

2. Where an answer can be given quickly and simply, respond directly to online questions and queries. More difficult or detailed questions should be referred to existing official channels. Media queries should be directed to the appropriate ACO PA office.

3. All ACO social media platforms should include a clearly posted comment policy that indicates to users the rules surrounding online interaction with ACO. This maintains ACO credibility when deleting comments that do not adhere to the policy. An example of a comment policy is as follows:

   a. No graphic, obscene, explicit, abusive, hateful, racist or defamatory comments will be tolerated. These will be removed as soon as identified and offenders may be banned.

   b. No solicitations or advertisements. This includes promotion or endorsement of any financial, commercial or non-governmental agency. Similarly, we do not allow attempts to defame or defraud any financial, commercial or non-governmental agencies.

   c. Details about ongoing investigations, or legal, or administrative proceedings that could prejudice the processes or could interfere with an individual's rights will be deleted from this page.

   d. Apparent spamming or trolling will be removed and may cause the author(s) to be blocked from the page without notice.

   e. No copyrighted or trademarked images or graphics may be posted. Imagery posted should be owned by the user.

   f. No comments, photos or videos that suggest or encourage inappropriate or illegal activity.

   g. No documents of any kind should be posted on this page.

   h. You participate at your own risk, taking personal responsibility for your comments, your username and any information provided.

   i. All information posted to social media sites will be no higher than unclassified.

   j. The appearance of external links or the use of third-party applications on this site does not constitute official endorsement on behalf of NATO or SHAPE.
GUIDANCE ON MAINTAINING SECURITY ONLINE

1. The following paragraphs outline the main categories of information that could be at risk when using social media and the potential consequences if this information is compromised.

2. Personal Information. Personal information is always at a premium in the criminal and espionage world. Personal information may also enable hostile intelligence agencies or terrorists to target military personnel or their families. Items of information which could be used to take advantage of you and your family include:
   a. Date and Place of Birth.
   b. Full Home Address, Telephone Numbers.
   c. Passport details, National ID Card Details.

3. Account Details. Criminal groups may try to gain access to online, telephone or other accounts using your account details. It is important that such information is not given to third parties. Information such as that listed below could be used for criminal activity or blackmail:
   a. Account Numbers, Logins, or User IDs.
   b. Passwords, Pin Numbers.

4. Details About Your Work. Hostile intelligence services and terrorist organizations may seek details about your work or your unit/establishment. Information such as establishment/unit locations, telephone numbers, ranks, unit strength, position details or role, could enable your establishment/unit to be targeted. Moreover, images can give away important information, so check to make sure that ID cards/official passes, keys, computer screens, paper documents and other potentially sensitive materials or equipment are not visible.

5. Operational Information. When directly involved in operations or supporting them, information protection becomes even more important and attempts to gather information by hostile agencies or groups may become more determined. The hostile exploitation of information may be used by an adversary to counter our operations putting lives and assets at greater risk. It may also damage our credibility with allies and potentially lead to withdrawal of their support. Do not release online information about:
   a. Operational Programmes, Deployment Details, Mission-Specific Information.
   b. Capability Shortfalls, Casualty Details, Morale.

6. Protecting Information. In addition to withholding the types of information described above, there are a number of simple steps to protect you, friends and colleagues online:
   a. Understand and apply your security settings; do not give out unnecessary

NATO UNCLASSIFIED
7. **Information Released in Error**: Security is everyone’s responsibility. If you see information on the public internet that you believe may have been released without appropriate authorisation, report the matter immediately to your chain of command so that mitigation action can be taken. If information is sensitive, personal or operational in nature, report the matter immediately via the chain of command to the local Security Officer.
Enclosure B  ACO Policy on the Release of Information

ACO PAOs will release as much information as possible to the public commensurate with operational security, next-of-kin (NOK) notification and national policies.

The following are the general policies for the release of information during NATO operations.

Specific policy should be addressed in the OPLAN, which in turn, will be approved by the Military Committee and the North Atlantic Council.

1. Personal Information.
   a. Avoid release of inappropriate personal information. Generally the name, rank, position and nationality of a service member is appropriate, but national policies will dictate. Some nations encourage the release of hometowns in order to draw public support but other nations discourage this policy for security reasons.
   b. It is usually inappropriate to release the names of family members, pay scales, or other information of a personal nature.

2. Casualty Information.
   a. Deaths or Killed in Action.
      (1) NATO PA offices in theatre will acknowledge deaths or serious injuries to personnel under NATO command in accordance with the PA principles. Ideally, NATO military PA will inform media first, and thus be ahead of adversary efforts to shape and frame media coverage of the situation for their own purposes.
      (2) Release of names, nationalities and personal details of service members killed or seriously injured is a national responsibility. Where casualties are incurred during an ongoing operation, relevant and verified information will be disseminated by NATO PA to the media in a timely fashion, while respecting the prerogative of troop contributing nations to confirm the nationality, detailed nature of casualties and the circumstances of the event. This requires speedy and proactive coordination to ensure message consistency amongst NATO and national PA communications.
      (3) PAOs should take care to ensure that the casualty release does not identify the nation (e.g. if only one nation is operating in a particular region, announcing that region will identify the nation and subvert the national prerogative to release the information). Pro-active staff work will identify the potential for such issues and the ACO PAO should coordinate ahead of time for an amicable solution with the nation.
b. Wounded, hospitalized or ill.

(1) National policies dictate the release of information with respect to wounded and sick NATO service members.

(2) OPSEC, patient welfare, privacy, and NOK/family considerations are the governing concerns related to media coverage of wounded, injured, and ill personnel located in medical facilities or other casualty collection and treatment centres.

(3) Permission to interview or photograph a patient, including those during medical procedures, will be granted only with the consent of the attending physician or facility commander and with the patient’s informed consent, witnessed by the person responsible for escorting the journalist. ‘Informed consent’ means the patient understands his or her picture and comments are being collected for news media purposes and they may appear in any news media reports. The attending physician will confirm that the individual is medically capable of giving informed consent.

c. Persons Missing in Action.

(1) The issue of missing persons is particularly important since it may be necessary to withhold information due to the security classification of the information (i.e. in anticipation of a rescue mission or the need to safeguard the information from an adversary in the event the person is trying to evade capture).

(2) A restriction on a journalist’s access or an embargo on the release of information related to a missing person may be established in such cases.


a. National Caveats.

(1) NATO and ACO do not discuss national caveats or restrictions imposed on forces involved in NATO operations. Such caveats are national business, outside the prevue of ACO PAOs to comment.

(2) Should question regarding national caveats be posed, the PAO will politely decline to discuss, while inviting the journalist to contact the appropriate MOD.

b. National Troop Contributions.

(1) The political headquarters will take the lead on announcing national troop contributions. Although the numbers might be taken from the theatre personnel tracking systems, NATO HQ will validate
the numbers with the various national authorities to ensure that the number is accurate and releasable.

(2) Once NATO HQ releases the number (typically on the product named “the Placemat”), ACO may refer to those numbers.

4. **Prisoners of War and Detainees.**

a. The Geneva Conventions relative to the Treatment of POWs need to be taken into consideration when providing the media information about POWs. While the conventions do not specifically mention the release of public information, various languages in the conventions clearly imply some limitations.

b. Article 13 states that POWs must be protected “against insults and public curiosity”. Public curiosity certainly can be taken to mean the news media. Article 14 states that POWs are “entitled in all circumstances to respect for their persons and their honour”. If potentially disrespectful images were released to the media, or if the release of an image in itself could be seen a disrespectful, this could be seen as a violation of the conventions.

c. Finally, Article 16 states that, taking into consideration other provisions in the convention, “all prisoners shall be treated alike”. Thus, to single out a prisoner of war to be displayed on TV, might be construed as a violation of the convention.

d. This is not to say that prisoners should never be shown on TV or exposed to the media. The need to inform the public may well mitigate the release of images or information about POWs if this is done appropriately and with respect for privacy.

e. Finally, ultimate responsibility for the release of information about POWs is left to the POW Information Bureaus called for in the conventions. These bureaus collect and share information so nations and next of kin can be duly informed.

f. When it comes to the release of information about prisoners of war, it is prudent to be very cautious. The privacy rights of prisoners must be weighed against the need to inform the public. General images designed not to embarrass or single out prisoners, but simply to inform the public, are likely acceptable.

5. **Court Proceedings, Indictments, Investigations and Evidence.**

a. Details about active investigations. Neither PAOs nor Spokespersons should comment on on-going investigations, whether procedural or criminal. Most investigations into criminal wrong-doing will be handled by either host nation or alliance national authorities. PAOs should acknowledge an on-going investigation and refer questions to the respective authority.
b. War crime indictments. NATO does not prosecute war crimes, therefore any queries with respect to war crimes or indictments should be referred to either the national authority or the presiding organization (e.g. The Hague).

6. **Operational Security (OPSEC) and Rules of Engagement.**

a. Information about Special Operations Forces. Names, units, tactics, techniques, and procedures should not be released or discussed without the NATO Special Operations Force Commander's expressed authorization. Respect national rules concerning release of information regarding SOF.

b. Intelligence gathering/sharing. Information regarding intelligence gathering, sharing or collecting should not be released or discussed.

c. ROE. Details about Rules of Engagements and detailed Escalation of Force procedures should never be released or discussed.

*When in doubt, consult your Legal Advisor and Higher HQ PAO*
**Enclosure C  NATO Structure, Policy and Command and Control**

NATO structure and policy development is depicted in the following organization chart. Although this is a simplified depiction, it gives the reader a general idea of the various organizations and bodies involved in NATO policy development and execution.

1. **NATO Headquarters.**

The NATO Headquarters, in Brussels, Belgium, is the political headquarters of the Alliance and the permanent home of the North Atlantic Council (NAC), NATO’s senior political decision-making body. It is home to national delegations of member countries and to liaison offices or diplomatic missions of partner countries. The work of these delegations and missions is supported by NATO’s International Staff (IS) and International Military Staff (IMS), which are also located within the Headquarters.

The NATO Headquarters provides a site where representatives from both the civilian and military side of all the member states can come together in order to make political decisions on a consensus basis. It also offers a venue for dialogue and cooperation between partner countries and NATO member states, so that they can work together in their effort to bring about peace and stability.

Each NATO member country has a delegation at NATO Headquarters in Brussels, Belgium.

The delegation has the status similar to an embassy and is headed by an
Ambassador or Permanent Representative (PERM REP), who acts on instructions from his or her capital and reports back to the national authorities. The responsibility and task of each delegation is to represent its member country at NATO. The authority of each delegation comes from its home country’s government, to which it reports back on NATO decisions and projects.

Each member country is represented on the NAC, the most important political decision-making body within NATO, by the PERM REP. The length of the Ambassador’s appointment depends on his or her home country. It generally ranges from one to eight years. The Ambassadors are supported by their national delegation, composed of advisers and officials who represent their country on different NATO committees, subordinate to the NAC. Each member country is represented on every NATO committee, at every level, and therefore the delegations are sometimes also supported by experts from capitals on certain matters.

An important function of the delegations at NATO Headquarters is the consultation process. Consultation among the delegations can take place in many forms, from the exchange of information and opinions, to the communication of actions or decisions which governments have already taken or may be about to take and which have a direct or indirect bearing on the interests of their allies. Consultation is ultimately designed to enable member countries to arrive at mutually acceptable agreements on collective decisions or on action by the Alliance as a whole.

Decisions made by the NAC represent the accepted agreement of each and every nation. Decisions are made by unanimous consent. Proposals are normally put ‘under silence’ with a correlating deadline. In effect, this means that if no objections are raised prior to the deadline (i.e. breaking silence) the decision is accepted by each nation and therefore constitutes a decision by the NAC.

2. **NATO Secretary General (SECGEN) and International Staff (IS).**

The NATO SECGEN is the senior international statesman nominated by the member nations as Chairman of the NAC, Defence Planning Committee, Nuclear Planning Group and of other senior committees. He also acts as principal spokesman of the Organisation, both in its external relations and in communications and contacts with member governments.

The work of the NAC and its committees is supported by the IS, comprised of the Office of the Secretary General, six functional Divisions, the Office of Resources and the Office of Security. Each Division is headed by an Assistant Secretary General (ASG).

The IS is an advisory and administrative body that supports the work of the national delegations at different committee levels and assists in implementing their decisions.

The IS supports the process of consensus building and decision-making as well as implementing and enforcing the decisions of NATO committees. The IS is responsible to the SECGEN, who decides who is appointed to the staff. Members of the IS owe their allegiance to the Organisation throughout the period of their
appointment.

3. **Military Committee (MC).**

The MC is NATO’s highest military authority, providing NATO’s civilian decision-making bodies – the NAC, the Defence Planning Committee and the Nuclear Planning Group – with advice on military matters. The MC is composed of the chiefs of defence of all 28 member countries and is headed by the Chairman of the Military Committee (CMC).

The CMC is elected by the Alliance CHODs and serves for normally a three-year term. He represents their consensus-based views as the principal military adviser to the SECGEN, the NAC and other senior NATO organisations. He guides the Committee’s agenda and deliberations, listening to views and working to reconcile divergent national positions or policy differences to fashion advice that all can agree to.

The MC’s principal role is to provide direction and advice on military policy and strategy. The MC provides the NAC, NATO’s highest political authority, with consensus-based military advice - that is, advice agreed to by all CHODs. It is responsible for recommending to NATO’s political authorities those measures considered necessary for the common defence of the NATO area and for the implementation of decisions regarding NATO’s operations and missions.

The MC is an integral part of the decision-making process of the Alliance, representing an essential link between the political decision-making process and the military structure of NATO, translating political guidance into military direction to NATO's Strategic commanders.

The MC also plays a key role in the development of NATO’s military policy and doctrine within the framework of discussions in the Council, the Defence Planning Committee, the Nuclear Planning Group and other senior bodies. It is responsible for providing military guidance to NATO’s two Strategic Commanders – Supreme Allied Commander Europe (SACEUR) and Supreme Allied Commander Transformation (SACT).

In this context, the Committee assists in developing overall strategic concepts for the Alliance and prepares an annual long-term assessment of the strength and capabilities of countries and areas posing a risk to NATO's interests.

In times of crises, tension or war, and in relation to military operations undertaken by the Alliance such as its role in Bosnia-Herzegovina, Kosovo and Afghanistan, its role is to advise the Council or Defence Planning Committee of the military situation and its implications, and to make recommendations on the use of military force, the implementation of contingency plans and the development of appropriate rules of engagement.

It is also responsible for the efficient operation of agencies subordinate to the MC.

At the Strategic level Allied Command Operations (ACO) is responsible for the preparation, planning, conduct and execution of NATO operations, missions, and tasks within a political-military framework endorsed by the MC and approved by the Council, in order to achieve the strategic objectives of the Alliance. Allied Command
Transformation (ACT) serves as the focal point for NATO's joint and combined concepts, research, technology, training and education development.

4. NATO Military Structure and Forces.

The Alliance military structure comprises:

- A NATO Command Structure (NCS) composed of permanently established HQs, including deployable components and supporting organizational elements. The NCS is based on functionality rather than geography.
- A NATO Force Structure (NFS), which includes Allied national and multinational deployable forces, joint HQs and single service HQs placed at the Alliance's disposal on a permanent or temporary basis.

NATO command and control structures ensure the ability to operate at three overlapping levels, military Strategic, Operational and Tactical levels.

5. Allied Command Operations (ACO).

There are three tiers of command: Strategic, Operational, and the Tactical or Component level.

ACO Strategic level HQ is located at Supreme Headquarters Allied Powers Europe (SHAPE), near Mons, Belgium, and is responsible for all Alliance operations wherever it may be required.

ACO is commanded by SACEUR. SACEUR is dual-hatted as the Commander of the US European Command, which shares many of the same geographical responsibilities. ACO is responsible for among other things, force generation for the various NATO missions, once approved by the NAC and tasked by the MC.

The Operational level consists of:

Two standing joint force commands (JFCs) in Brunssum, The Netherlands and in Naples, Italy both of which can conduct operations from their static locations or provide a deployable Combined Joint Task Force (CJTF) headquarters.

Three Allied Component Commands, which provide service-specific – land (Allied Land Command Izmir), maritime (Allied Maritime Command Northwood) or air (Allied Air Command Ramstein) – expertise and support to the other HQs at the operational level. These HQs can also be used to provide the core of a CC HQ for a small joint operation or deployable C2 capability for a single service operation in accordance with their specificities.

ACO structure also includes the NATO Communications and Information Systems (CIS) Group (NCISG)(HQ located at SHAPE) responsible to provide deployed CIS services.

6. Allied Command Transformation (ACT).

ACT leads the transformation of NATO’s military structure, forces, capabilities and doctrine. It enhances training, particularly of commanders and staffs,
conducts experiments to assess new concepts, and promotes interoperability throughout the Alliance.

Headquarters, Supreme Allied Commander Transformation (HQ SACT), located in Norfolk, Virginia, directs ACT’s various subordinate commands including the Joint Warfare Centre (JWC) in Norway, the Joint Forces Training Centre (JFTC) in Poland, the Joint Analysis and Lessons Learned Centre (JALLC) in Portugal and various NATO schools and Centres of Excellence.

There are direct linkages between ACT, NATO schools and agencies, as well as the US Joint Forces Command, with which ACT Headquarters is co-located.

For a more detailed explanation of NATO Policy, please see: http://www.nato.int/cps/en/natolive/structure.htm

7. **NATO Public Affairs linkage.**

The PA function of the Alliance is headed by the Public Diplomacy Division of the International Staff. Specifically, the Press Service takes the lead with respect to communications, with the MOC taking the lead as the primary element overseeing media operations and outreach for the ISAF mission and other special projects.

Through direction and guidance from the SECGEN and with input and approval by the NATO Spokesman, the press service develops communications guidance and messaging for the alliance.

These communications plans are then taken by ACO and ACT and developed into military plans, typically in the form of operation plans public affairs annexes, fragmentary orders, public affairs guidance and media lines.

Due to the fluid nature of the media environment, often the Press Service will require direct contact with the operational and tactical levels of the military structure. Agreements stand which allow such contact, provided the military chain of command is informed of the contact.

The Press Service and MOC do not have direct tasking authority over the military structure at any level. However, in the interest of alliance cohesion and unity of effort, amicable solutions should be sought to accommodate the needs of all levels of the communications structure.
Enclosure D  

NATO Visual Identification Guidelines

NATO HQ has developed a very comprehensive visual identification guide (NATO Visual Identity Guidelines) for use of the NATO logo. Relevant excerpts are included in this Enclosure as a reference. The majority of the guide has been omitted for brevity.

1. The NATO logo as a modular concept.

The NATO logo is the most important element of the overall visual identity. It consists of different components, which can be extended depending on its use. The predominant component is the Compass set in the middle of four squares featuring two shades of blue. This part of the logo can never be changed. It will appear in the same configuration on every NATO communication tool.

The second component of the logo is the black & white name box NATO / OTAN. English and French being NATO’s two official languages, the standard configuration for use on stationery and publications is the English / French version. The use of the bilingual version is obligatory. It cannot be substituted by other language versions.

When used in the heading of specific publications, the logo determines the shape and size of the whole heading. It becomes part of the heading. In order to preserve the distinctive quality of the NATO logo, no alterations should be made – whether to its form, colour or otherwise. The logo should be accurately presented according to the mandatory standard proportions and orientation as illustrated here. It should not be outlined or italicised. No objects, letters, numbers or symbols should be superimposed on it.

2. The Compass.

Since the early history of NATO, the Compass has been its predominating symbol and is widely recognised by many audiences. To preserve this recognition, the Compass remains the most important component of the NATO logo. To reinforce the impact of the Compass, it has been placed on a blue background and divided into 4 quadrants, reinforcing the idea of a multi-faceted mission for NATO.

The blue colour is used to illustrate the ‘Atlantic’ dimension of the Alliance and to underline NATO’s cooperative approach.

3. Using the Compass as a stand-alone symbol.

The logo is universal enough and the Compass so closely related to NATO, that in
exceptional circumstances where there is not enough space to use the full logo-combination with the name box, or when the material or the size is not suitable to use the complete logo-combination, the Compass can be used as a standalone symbol. This solution may be appropriate for branding purposes on flags, bags, boxes, vehicles, buildings, pins, etc. However, this solution is only acceptable when the medium does not allow, for technical reasons, to use the full logo-combination with the name box.

4. **The name box NATO / OTAN.**

The second component of the logo is the name NATO / OTAN in the standard configuration English and French. The use of these languages is compulsory. They cannot be replaced by other language versions of the name NATO.

The name boxes are situated in the folder “NATO_Name Box”.

5. **About the use of typefaces and alphabets.**

The name NATO / OTAN is always printed in capitals. The size of the letters is in proportion to the size of the black box and cannot be changed. The space between the letters should be similar to the one in the example. The black box is divided in two by a horizontal white line. A small vertical line marks the centre of the black box. Within publications, Garamond CE MT can be used for subtitles, quotations and captions. The main corporate typeface for NATO’s written communications is Arial. This font should be used for the body text of publications. Arial (and Garamond CE MT) have been chosen as typefaces as they can be used in almost all alphabets. Arial (and Garamond CE MT) are available in Roman as well as in Greek, Cyrillic, Turkish and other alphabets. For NATO in-house use, the Garamond or Arial fonts appearing in software used throughout NATO Headquarters are appropriate equivalents.

6. **The logo-combination.**

The Compass and the name box together form the standard NATO logo. Depending on their use, they can be combined in a vertical or horizontal way.

7. **The vertical NATO logo.**

The size of the Compass and the name box are equal and fit perfectly together. Due to the colours used, the Compass and the name box are clearly distinguishable. Only in grey-scale an additional horizontal white line is needed to distinguish both parts.

8. **The horizontal NATO logo.**

Both components can also be arranged in a horizontal way. Again there is enough
distinction in colour to visually differentiate between the two elements. Only in the grey-scale version, a vertical white line needs to be added.

9. **Standard combination of logo elements.**

The logo-combination illustrated here is the first complete signature of NATO. It contains the visual identifying mark of the Compass and the written identity of NATO. People cannot be mistaken: this is clearly NATO and no other organisation. In this way the standard logo combination is the primary base of the whole house-style. It will determine all applications of other logo-combinations. Therefore it should be used wherever possible. For items where the whole combination is too difficult to apply, the Compass can be used as a stand-alone symbol, but these are the only exceptions to the rule. See also point 1.2.7. of NATO Visual Identity Guidelines for the use of the Compass.

10. **Correct use of the logo.**

Many factors can influence the visual impact of the logo. To ensure that the best results are achieved, certain rules should be respected. Everyone at NATO should carefully consider the size and the execution of the logo every time it is used. Not all possible environments / situations in which the logo will appear can be foreseen in advance. In addition, visual identity guidelines should not unduly restrict creativity and imaginativeness of designers. Therefore these guidelines are limited to the most frequent applications and are confined to a minimum set of rules.

It is of the utmost importance for the success of NATO’s new visual identity that all NATO communication activities and tools show consistency in the application of the visual identity guidelines. It will improve recognition of NATO products, show coherence within the Organisation and increase the impact of communications.

11. **The logo size.**

The size of the logo should always be in balance with the space available. However, there are minimum sizes that depend on the capacity of the medium to reproduce the fine thin lines of the logo. Sizes in which those thin lines risk disappearing should be avoided.

For the NATO logo, the critical limit for high-class printing is a size of 1.5cm x 1.5cm for the Compass. For newsprint the critical size becomes 2cm x 2cm because the screen used for newsprint does not allow the printing of fine details. Printing on materials other than paper can cause the same problems: jute for example, needs a far bigger logo than paper. Even the critical size is for most non-paper material too small. In these cases at least two times the critical size should be considered as a safe minimum size.
Several main formats can be distinguished in determining the size of the logo. These are:

a. Stationery.

For a DIN A4/US-sized paper a size of 2 cm x 2 cm for the Compass, and 2 cm x 4 cm for the combined logo is recommended. Envelopes, compliment slips, fax and memo sheets should use the same size logo: 2 cm x 2 cm, i.e. 2 cm x 4 cm for the combined logo. Only the business card is an exception. Due to its small size the logo will be reduced to 1.5 cm x 1.5 cm.

b. 2. Publications in DIN A4 / US.

Publications usually carry on the front cover the logo as a “signature”, i.e. on its own and thus not part of a masthead. When NATO is the publisher or editor of the publication, and when the logo is used on a DIN A4/US-sized paper, the width of the Compass is preferably 4 cm x 4 cm or 3 cm x 3 cm as a minimum. When NATO is not the publisher of a publication, the Compass should be 2 cm x 2 cm or 1.5 cm x 1.5 cm.

For NATO publications in DIN A5 format and for flyers, the preferred size of the Compass on the front cover is 3 cm x 3 cm, and accordingly 3 cm x 6 cm for the combined logo. The logo as part of a masthead. When the logo-combination is combined with other items, like titles, dates and numbers and covers the complete masthead of a publication, its size is 4 cm x 8 cm on a regular DIN A4/US-format.

c. Smaller and larger formats.

Posters and billboards should have larger logos, smaller leaflets and flyers should feature on the front cover logos of the same size as on the DIN A4/ US and A5 publications. Whenever possible, logos smaller than used on the DIN A4/US paper or on the DIN A5 format should be avoided. For publications with a larger size than DIN A4/US, the logo should be enlarged to the same proportions needed for scaling the DIN A4/US format to that specific publication. The reverse can be applied when, for example, promotional items are smaller than a DIN A4/US format. In this case the logo should be reduced to the same proportions necessary for scaling the DIN A4/US format down to the smaller publication size.

Where different publications in different sizes need to function together for a common purpose (e.g. when placed in the same folder), it may be preferable to keep the logo in the same size.

12. **Protection of logo integrity.**

The colours of the logo should never be switched. Verification strips for checking the colours on all printed material have been included in the last chapter of this manual. Modifications of the logo’s typography such as in-lines, outlines, shadows, etc., are
not allowed. Neither the proportions nor the typography of the logo should be altered. The grey-scale or line-art versions of the logo should not be used in a full colour environment. The logos should be used in the way they appear on the CD-ROM and on the NATO Intranet.

The logo should not be distorted in any way, e.g. by using shadows or halos. An exception can be made in animations of the logo. But even then the result of the animation should be the logo as it is, without changes.

13. **Co-branding for NATO Agencies and Commands.**

NATO’s visual identity guidelines as approved by the Secretary General in 2002 apply to NATO as a whole and should thus be used throughout the Organisation. As such, they also reach out to NATO agencies and commands. Simultaneously, this appliance of the Guidelines has to reflect that NATO with its network of agencies and commands is not a monolithic bloc but rather a multifaceted organisation. In light of this context, NATO’s visual identity guidelines foresee in essence a co-branding approach whereby agencies and commands can establish a strong visual link to NATO by combining their respective emblem or coat of arms with NATO’s logo on their range of public information material such as websites, publications, letterhead, business cards, etc. This approach has the advantage that agencies and commands can be directly visually associated with NATO while allowing for a prominent individual feature to profile the distinctive identity of the respective agency or command.

Basic rules for this co-branding are the following:

- The overall rules of NATO Visual Identity Guidelines, especially those of chapter 1, The NATO logo, should be respected.
- It is understood that agencies and commands have in most cases an established emblem or coat of arms which they can and should retain.
- In combining their respective emblem or coat of arms with the NATO logo, the NATO logo has to remain in the top left corner of the information material while the visual symbol of the agency or command should be placed in the top right corner. The latter can therefore be displayed at the same level and in the same size as the NATO logo. However, emblems or coat of arms from
agencies and commands should not be directly attached to the NATO logo since this would equal infringing the integrity of NATO logo itself.

Please consult point 5.9.2. of NATO Visual Identity Guidelines for the design of co-branded websites. More specific solutions to this co-branding would have to be sought on a case-by-case basis. NATO’s Public Diplomacy Division at NATO Headquarters is available to provide further advice and guidance upon request.

14. **NATO press release.**

Press information needs to be available in colour for press material that is handed out at major press briefings and press conferences or sent to the media by post.

The line-art version is used for information that is being sent by fax to ensure a better visibility. It is also a cost-effective solution for day-today use, e.g. via photocopies. The text of the press releases should be typed in Arial, 12pt.

The Press release templates are available on the CD-ROM in the following folders:

- NATO_TEMPLATES_QUARK.
- NATO_TEMPLATES_WORD.

15. **NATO media advisory.**

Other material directed at the media such as media programmes and background briefings, can also be presented in the same way as press releases. Also the stickers on press photos should be branded with the NATO logo.

The corresponding templates are available on the CD-ROM in the following folders:

- NATO_TEMPLATES_QUARK.
- NATO_TEMPLATES_WORD.
16. **The NATO website.**

The NATO website is visited on a daily basis by a wide audience.

The NATO identity needs to be applied to this communication tool in the same way as with publications and other information material, ensuring consistency in presentation.

An example showing the current style of the NATO website is presented on this page.
17. Websites of NATO Commands, Agencies and Committees.

Most of the NATO commands, agencies and committees have a website. While in the past the approach to their design and look used to be very different, the gradual introduction and application of the visual identity guidelines has allowed to create a growing family of NATO related websites over recent years. In order to achieve this consistency in the look of websites and a clear link to NATO, a basic template is proposed and regularly applied.

This template is in line with the overall co-branding approach as described in point 3.2. of NATO Visual Identity Guidelines. This template follows a simple, flexible three-column format and allows the use of relevant illustrations in the header as well as the respective command, agency or committee logo, coat of arms, etc. Attention has been paid to the fact that this specific logo or coat of arms should be given the same weight as the NATO logo. In point 5.9.2 of the aforementioned Guidelines, style sheets can be found as A4 print-outs. The Belgian company e-Forumfactory provides a program for web content management in the ACO NATO style. Not all subordinate commanders use this web program but have copied the layout. The ACO website will be renewed in 2014 with a better Social Media integration and to allow use on smartphones and tablets. The new style will be more in line with the NATO website and will contain less pull down menus. Twice a year a web content management course is provided by e-Forumfactory at SHAPE.
Enclosure E  NATO Force Generation and Manpower Issues

1. **Introduction.** NATO manning for standing headquarters, deployable headquarters and operational capabilities are managed through PE, CE, and CJSOR. The CJSOR is a table setting out the type and scale of forces and capabilities required to implement the military strategic concept for a particular operation. It is produced as part of the Operations planning process (CJSOR initially produced at operational level and force generation process at strategic level). The recruiting and soliciting for nations to fill those posts are conducted through the Flags-to-Post (FTP) assignments, Manpower Coordination Conferences (MCCs) and Force Generation process and is the primary responsibility of DSACEUR.

2. **Reference.** The detailed regulations governing the CE and Force Generation process are contained in ACO Directive 045-003, Provision of Manpower for NATO Operations and Exercises, dated 09 January 2014. The following are selected excerpts from this Directive and SHAPE Force Generation procedures to provide ACO PAOs a working understanding of the terms and process.

3. **Definitions.**

   a. **Force Generation.** The overall process of defining capability requirements then soliciting nations to fill those requirements.

   b. **Flags to Post.** The recruiting process which solicits and selects national bids to each post on the CE at OF-5 level and above. For posts at OF-4 level and below the MCC is used.

Following the NAC FAD, a force generation process is triggered by SHAPE releasing ACTWARN. A CJSOR is drawn up by SHAPE Plans Directorate, Force Generation Branch (FOG) and generally includes the HQ CE as the first line serial. It is necessary to build a HQ CE for the control of every operation so that effective management of the manpower committed to CRO HQs can be undertaken. The posts on the HQ CE are usually distributed to nations based on force contributions to the CJSOR. Countries that provide leadership for an entire operation or mission, or take responsibility for distinguished elements, are identified as “lead”. For example, the lead country for a given operation or mission might provide the command element and a significant part of the forces, and will also be responsible for filling the remainder of the force required.

Once the CE and CJSOR are completed, the Resources Directorate, J1 Division, Manpower & Organisation Branch will staff a proposal to DSACEUR for his approval after which he releases the proposal to nations for their agreement. In broad terms the process follows the principles of simplicity, transparency and adequacy seeing nations rewarded for their contributions (quality and quantity) of CJSOR capabilities, strictly related to the mission requirements and the risks incurred. Each mission is treated separately. DSACEUR is required to notify the MC of agreements made with CHODs over the allocation of flag posts. New flag posts should be advertised to all TCNs.
for bids, after which DSACEUR will make a selection based on suitability and national CJSOR contributions. Once this selection is made, each ‘post’ is then matched to a national flag. This nation is then responsible for maintaining this post with a trained and qualified service member.

c. Operational headquarters manning is allocated through the CE. A CE is a table setting out the authorised posts for a Crisis Response Organization (CRO) unit, formation or headquarters. The CE is the mechanism for the provision and sustainment of qualified manpower to the HQ\(^{33}\). Manning for the ACO headquarters is allocated through the PE. A PE is a table setting out the authorized peacetime manpower requirement for a unit, formation or headquarters. The PE dictates manning at SHAPE, the JFCs, Allied CCs, etc.

The full PE or CE would consist of:

- the establishment table (manning document in Excel spreadsheet format),
- the organization chart (PowerPoint depiction of the reporting chain and command structure), and
- the Job Descriptions (JDs) that support authorised posts.

d. Capability requirements are defined in the CJSOR – The CJSOR is a force catalogue indicating types of capabilities for NATO defence planning scenarios. This catalogue does not deal in specific numbers of troops required to fill minimum manning. Rather, realizing that each nation approaches military capabilities differently with respect to technology, training, and manpower, the CJSOR lists the capability required for a particular mission or task. For example, a CJSOR might define a requirement to provide a flight line repair capability. To some nations this capability might be filled most easily by two service members with a bulldozer, while another national solution might be more manpower and less machinery intensive. Ultimately, the CJSOR says what needs to be done and the nation completes the task with what they can offer.

4. **Modifications to the CE/CJSOR.**

a. Periodic Mission Review (PMR). The PMR is the process by which the military command structure assesses the current state of a particular operation and provides feedback and recommendations to the Military Committee, which in turn provides the results to the NAC. Recommendations normally include changes to the mission, political objectives and end state and military tasks so the NATO command is prepared to meet its objectives. The PMR is conducted at least annually but might be performed more frequently if so directed.

\(^{33}\) All CEs shall be planned and built using the automated Personnel Management System (APMS). This tool has been implemented across the whole of the NCS, NAEW&FC, E3A, NCIA and the ARRC.
The recommendations from the PMR often influence changes to the CJSOR and CE. Familiarity and involvement in the PMR process can pay dividends when attempting to increase capacity and capabilities in theatre.

b. After each Manpower Organizational Review (MOR), a new CE is presented to TCNs to enable them to bid for posts. Nations’ offers are provided to Operational Establishments Section (OPM) in J1, and are finalised or de-conflicted during a Manpower Coordination Conference (MCC).

c. Change Proposals. SHAPE Resources Directorate, J1 Division, Manpower & Organisation Branch, OPM maintains the master CE for each HQ, which can be viewed on the SHAPE Portal. SHAPE RES J1 OPM is the sole authority for alterations to the CE. Any proposed amendments to the CE by the theatre HQ must be provided to SHAPE RES J1 OPM through the chain of command, and staffing by SHAPE Directorates will take place as appropriate when functional advice is required. Subsequently, any endorsed alterations to the CE will be communicated to the requesting HQ.

5. Restrictions/Constraints.

a. SACEUR is the ultimate authority for all CEs with responsibility delegated to DSACEUR. JFCs and Commanders of the Operation must obtain DSACEUR approval prior to any CE or CJSOR change becoming final.

b. National manpower is deployed to a PE or CE on the basis that it will be employed to an agreed post and for an agreed length of time. As a rule, all deviations from this principle should be agreed with the local Senior National Representatives (SNRs) prior to the change. In exceptional circumstances operational events may require prioritisation of activities within PE/CEs, which may necessitate a temporary realignment of staff in an expeditious manner. To meet these requirements, the senior NATO Commander in theatre may authorise reassignments of CE staff in support of pressing operational requirements. The local SNR shall be informed in advance of any changes in post allocation. Any permanent reassignments require prior approval by the local SNR.

c. Military posts should be filled by military personnel meeting JD requirements. In filling posts at and below OF 4, an individual ranking one above or below the required grade may be accepted. Prior approval from Director J1 SHAPE is required for all posts where the incumbent is not the same rank as that stated in the CE.

6. Supplementary Manning. Additional personnel in excess of authorised CE posts may, exceptionally, be provided from time to time for duty within international staffs. Such Supplementary Personnel are to be classified as:

a. Non-CE Posts. There are some posts such as higher level advisors (e.g. POLADs) not commonly funded but included in the CE matrix to provide a complete picture of the whole C2 structure.
b. Interim Post. An Interim Post (IP) is a non-permanent CE post which has been established by the in-theatre CE authority to be filled for an agreed duration by a specific Nation. IP posts are outside the CE Manpower Ceiling.

c. Manpower Overage. A military or civilian person offered by a TCN without request but with the consent of the in-theatre CE authority, to perform NATO functions within the confines of the NATO organisation, but who is not assigned against an authorised CE post and who is managed and paid by the Nation concerned. Manpower Overages (MOs) are not included in the CE Manpower Ceiling nor shown on the CE.

d. Standby Posts. Some posts may be deactivated by putting them under standby status for a specific period. During this time, if a need for activating these posts is forthcoming, then they will be opened. At this point they will be offered to the nations for their bids. The posts not needed to be opened again will be deleted normally after the next MOR.

e. Voluntary National Contributions (VNCs). VNCs are military or civilian personnel voluntarily appointed by TCNs either to temporarily meet a request for additional manpower, or to meet a national requirement. VNCs are not normally part of the CE/PE, but are to be recorded on the manning roster for tracking purposes. Civilian VNCs are not subject to NATO regulations, directives, policies, in-theatre SOPs applicable to the NATO civilian workforce; they are subject to the regulations of their respective country.

f. Nationally Assigned Personnel. Military or civilian personnel provided by a nation for national duties within the NATO organisation, the funding for which is paid by the nation concerned and which is not a responsibility for the NATO military budgets. Nationally Assigned Personnel (NATs) are not shown on the CE.

7. Civilian Personnel.

a. National Civilian (Civ). Posts in the CEs filled by national civilians from the national ministries of NATO and Non-NATO Nations. They are filled at the expense of the respective nation.

b. NATO International Civilian (NIC). NICs are employed by a NATO command or agency and are normally sent to CRO on orders from their parent organisation and their status is governed by the SOFA.

c. International Civilian Consultant (ICC). When functions within a Theatre HQ are civilianised, and require international experience, ICCs will be selected to fill specific to theatre requirements.

d. Local Civilian Hire (LCH). Functions within a Theatre HQ which require locally employed civilians will be filled by LCHs who are selected to fill specific to theatre requirements.
8. Other Administrative Notes.

a. Tour Length and Rotation Policy. Personnel rotation policy is a national responsibility. The OPLAN will specify the recommended tour length and a minimum tour length of 6 months is the norm. It is important that the senior leadership should provide continuity to the direction of the campaign and therefore the tour length policy for OF-5 and above is normally 12 months. It is possible that a number of other specified posts at OF-4 and below will have extended tour lengths. The recommended tour length is shown on the CE.

b. International Evaluation Reports (IERs). Should a participating nation request an IER for any personnel assigned to a CRO HQ, theatre HQ J1 will process the IER in accordance with AD 045-001, ACO Military Personnel Management and Administration for Peacetime Establishment Posts, dated 29 January 2014. The chain of command is responsible for ensuring that the signed report is correctly filed and that the original is handed over to the NCC/NSE\textsuperscript{34} for filing in the individual’s personal file in his parent unit.

c. Leave policy is a national responsibility that cannot be dictated by NATO. SHAPE guidance is that individuals should be entitled to 2.5 days leave per month for a 6-month tour and two 96-hour passes. If the SNRs in theatre all agree to a unified policy, then the Commander of the Operation can impose a single coordinated policy based on national guidelines, which will avoid a single nation being advantaged or disadvantaged. It is the prerogative of the Commander of the Operation to set the key post manning policy within the HQ, which can be used to regulate manning levels.

d. Lack of Suitability due to Language Inadequacy. Due note is to be taken of the CRO Language Policy sponsored by SHAPE Resources Directorate, J1 Division and personnel arriving in theatre with inadequate English language skills against the JD requirement shall be reported to the NCC/NSE and to the chain of command, with the aim to replace the individual as soon as possible. The concerned SNR is to take any necessary actions to solve this issue to the benefit of all parties involved, whilst Resources Directorate, J1 Division will inform the concerned NMR of the situation.

e. Discipline. Discipline is a national responsibility. However, any serious outbreaks of ill-discipline, which are likely to attract unfavourable media attention, should be forwarded via the chain of command.

\textsuperscript{34} National Coordination Cell/National Support Element.
1. **Introduction.**

Within PA, applied journalism is the term that describes using journalistic skills and writing techniques to deliver specific messages to target audiences. Although journalism usually refers to the print medium (newspapers, magazines, and periodicals), for the purposes of this chapter, applied journalism also includes writing for radio and television and the Web.

All ACO PAOs shall use the principles of applied journalism in preparing ACO PA products in support of NATO PA activities or objectives.

The following section covers the basic types of applied journalism writing formats that are used in a variety of products prepared for release to the external media: news releases, media advisories, fact sheets and radio beepers.

2. **The News Story.**

A news story must be of *immediate* importance. Editors are interested in covering events that are coming up immediately, but they are never interested in hearing an account of what happened yesterday or last week. Immediacy is the single most important factor in hard-news stories. In addition to immediacy, below is a list of other factors which contribute to an event’s newsworthiness:

- **Prominence** - is there someone famous, notorious, or political involved?
- **Proximity** - is the event in the community?
- **Controversy** - is the event likely to provoke public discussion?
- **Conflict** - are people or groups of people opposing each other?
- **Relevance** - is the story likely to be of interest to the public?
- **Money** - is there a money angle?
- **Timeliness** - does it relate to a specific current event?
- **Entertainment** - is the story funny or amusing?
- **Danger** - is there risk involved?
- **Human interest** - is there something in the story that will appeal to readers’ common experience or emotions?
- **Immediacy** - is the story relating to something happening now?
- **Consequence** - is there a significant impact on people?
- **Progress** - is the story showing an evolution of some sort?
- **Oddity** - will people be interested by the oddity of the story?
- **Emotion** - will the story touch the feelings of the readers?
- **Suspense** - is the story creating suspense?
The news story format is what is used most often in the ‘news release,’ as referred to by NATO, is a mechanism to release news. The private sector often uses the term ‘press release’.

Generally, the information in a news story must answer the following questions: Who, What, When, Where, Why, How, and How much? (We call these the 5 Ws & 2 Hs).

All information you receive from an interview should be put into one of the boxes below. When you have done this, your lead will become clear and you will be able to easily write your news release or news story in the style that is the accepted structure throughout the news industry.

<table>
<thead>
<tr>
<th>WHO?</th>
<th>Full details of person or group spelled out: rank, first name(s), last name(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full details of unit spelled out</td>
</tr>
<tr>
<td>WHAT?</td>
<td>Explain succinctly what happened/is being announced</td>
</tr>
<tr>
<td></td>
<td>Round numbers up or down (NATO is deploying about 3000 soldiers, rather than NATO is deploying 2987 soldiers)</td>
</tr>
<tr>
<td>WHEN?</td>
<td>Day and month</td>
</tr>
<tr>
<td></td>
<td>You don’t need the calendar year if the event/announcement is in the same year</td>
</tr>
<tr>
<td>WHERE?</td>
<td>Exact location keeping in mind operational security issues if that is a factor</td>
</tr>
<tr>
<td>WHY?</td>
<td>Explain the significance of the news event</td>
</tr>
<tr>
<td></td>
<td>If there are operational security considerations that preclude releasing this information, say so</td>
</tr>
<tr>
<td>HOW?</td>
<td>How did an incident happen?</td>
</tr>
<tr>
<td></td>
<td>If there are operational security considerations that preclude releasing this information, say so</td>
</tr>
<tr>
<td></td>
<td>If this information is part of an investigation into an incident/accident, then say the information cannot be released because of an ongoing investigation</td>
</tr>
<tr>
<td>HOW MUCH?</td>
<td>What is the cost, if relevant? For example, if you are announcing a major equipment purchase, the cost of that purchase is relevant</td>
</tr>
<tr>
<td>OTHER INFO?</td>
<td>For example, information for a ‘note to editors’: how to register media for an event, how to gain access to your military installation, exact street address, who to contact for more information, ground rules on taking imagery</td>
</tr>
</tbody>
</table>

The news story is particularly effective for conveying factual information in a concise, standard format. Always write news stories in the active voice and the present tense, in the same way as you write a news release. Be careful to avoid jargon, slang and abbreviations (however, on second reference abbreviations are acceptable to most nations’ journalism standards).

News stories should also include quotations from your key organization representatives. These quotations, if used judiciously and effectively can contribute to the news releases readability and credibility.
The ideal news release fits on one or two size A4 pages. On first reference to an individual person or specific unit spell it out fully, using the full rank title, first and last names, in accordance with the individual’s national style. On second and subsequent references use only the individual’s last or family name. Except, when preparing material in French, NATO’s other official language, abbreviations are not used.

3. **Inverted Pyramid Format.**
As for structure, most news stories are constructed from the top down. The classic news-release format is the inverted pyramid: lead, bridge and body. If the information is arranged in order of importance and the editor finds the news release too long for the space available, the editor can easily cut the story from the bottom up without removing the most significant material.

4. **The Lead.**
The lead is the most important element of the news story and entices the reader into the rest of the story. A good lead is usually about 15 to 25 words. It also answers as many of the five Ws and two Hs as possible. Below is the standard news lead.

5. **The Standard Lead.**

*KABUL, Afghanistan* – Five NATO forces were killed and six others wounded by a road-side bomb in Regional Command West at approximately 2 p.m. Oct. 15 while executing a routine mission.

6. **The Bridge.**
The bridge provides the transition from the lead to the body of the news release. It usually contains key information, such as the "why," not contained in the lead. To revisit the lead above, a typical bridge paragraph might read:

*Three of the wounded are in critical condition and have been flown to Germany for further treatment. The other three wounded are being treated locally.*

7. **The Body.**
The body fills in those secondary or less important details that the lead and the bridge did not cover. Although this material is the "first to go" if the editor is short of space, it is still worth including, since it may appear in media coverage if space permits. A body paragraph for a news release could look like this:

*NATO takes every precaution to ensure that military members are trained and equipped to react to incidents like this. Due to the quick response of the medical evacuation helicopter and crew, several of the critically wounded were stabilized enough for transport for further care.*

8. **Feature Writing.**
Another form of applied journalism writing style is the feature story, sometimes referred to as ‘soft news’. Feature stories are often ideal for unit or community newspapers or as a homeowner release (see Annex 9-F).
To convince an editor that a story idea has feature potential, the subject material must be timely and of interest to your intended audience. Once you are sure the idea meets those criteria, you must decide which of the two basic types of feature story you think is most likely to be printed—the human-interest story or the informative story.

The human-interest feature story focuses on how an event affects an individual, or group of individuals.

The informative feature story examines a subject or event in considerable depth. The feature is a good way to tell a story from a positive viewpoint, as long as the appropriate subject material is emphasized.

9. **Products:**

   - **The News Release.**
     
     The news release serves not only as a source of information, but also provides notice to editors and news directors of policy developments, operations, events, and activities they may wish to cover in greater depth using their own resources. As a fair and common practice, news release should be sent to all appropriate media agencies that you deal with simultaneously via fax, email or internet.

     All ACO news releases must be approved by the appropriate level authority potentially contentious or significant releases should be coordinated with higher headquarters before release. See Annex 4-K for a news release example.

     Ideally, the contents of a news release should be distributed by the chain of command to the internal military/civilian audience before the media receives it - particularly if it is very negative or tragic information.

     The news release is just one way of achieving a specific communications objective or effect. Bear in mind, however, that not all activities warrant the issuing of a news release. After all, a news release is supposed to be about something newsworthy—it is not a form of free advertising. If you send out a news release that does not contain any news, pretty soon the media will ignore your news releases – to your detriment! News releases are issued when you have news to release.

     A sample news release and a checklist to assist you in preparing a news release are annexed to this chapter.

   - **The Media Advisory.**
     
     The media advisory is also an important tool in the PAO toolbox. As the name implies – a media advisory is mechanism to advise the media. Unlike the news release, a media advisory is used to advise or inform news agencies of upcoming, newsworthy events or activities. Media advisories may announce news conferences, speeches by prominent individuals, visits by
foreign dignitaries, or the release of major policy papers, to cite just a few examples. A media advisory is issued when you want to let the media know that something is going on. See Annex 4-L for a media advisory example.

- **Backgrounders or Fact Sheets.**

Backgrounders or fact sheets are prepared to provide detail about a comprehensive subject or a subject that is detailed and complicated. A backgrounder or fact sheet document will often be prepared to accompany a news release and will contain amplifying or background information on a particular subject. This background information is not necessarily news, so it does not go into the news release but it is important information and very germane to the story. Backgrounder or fact sheet documents allow media outlets (most often print media) to get more in depth into a story. See Annex 4-M for a fact sheet/backgrounder example.

- **Photo Cutlines and Captions.**

Well-composed, strong photos can contribute greatly to the appeal of news and feature stories. Occasionally, photographs are strong enough to stand alone without a story; they are called ‘stand-alone photos’ and include a skeleton cutline.

- **Cutlines.**

A cutline is a stand-alone statement that accompanies a photo release. It contains the five Ws in a single sentence, the same as a lead, and a line of additional information, usually, one of the two Hs. There are a few basic guidelines on how to write photo cutlines:

- Always write in the present tense.
- Identify the action – clearly explain what is happening in the picture.
- Clearly identify people seen in the picture, usually from left to right.
- Identify the location.

- **Captions/Skeleton Cutline.**

A caption is the written material that goes with photographs to support news stories or feature articles. Captions or skeleton cutlines are a minimum of the 5Ws, a lead equivalent. The chapter on Imagery, Chapter 9, has more details on writing cutlines and captions and should be consulted when PAOs are preparing either of these two products.

- **The Hometowner.**

The hometowner is a form of applied journalism peculiar to military PA. It can be a feature story or photo and cutline sent in the form of a News Release to
community newspapers in the hometown (hence ‘hometown’) of the person featured.

Hometowners use references that link the individual to their place of birth or families’ current residence to highlight their efforts abroad, raising personal morale and community support and understanding for the nation’s military and NATO. They also blend personal information with information about operations, policies, and activities.

Hometowners are most effective when they originate from operational deployments, field exercises, special events or foreign locations. This gives them enough newsworthiness for editors to use them without compromising their journalistic principles.

The standard hometowner (photo and cutline) should not be more than 150 words. A typical hometowner might read as follows:

Airman 1st Class Sarah English, a Panama City, Fl. Native who is currently serving in Joint Forces Command Naples, led a clothing drive for the victims of a recent earthquake the shook the region and destroyed a city just outside of Rome. English is a communications specialist for NATO and is aiding in security and humanitarian operations in the Balkans, Iraq and the Mediterranean Sea.

• Writing for Radio.

Radio is the best way to reach the general public almost anywhere, any time of day. This is particularly true if our listening audience does not have a high literacy rate. Radio coverage is instantaneous and can be as simple as picking up the phone.

When preparing a news release/radio beeper, specifically, for radio, it is important to understand that its requirements are very different from those of newspapers and vary from nation to nation. Typically in western media, radio news broadcasts are seldom longer than five minutes and a radio beeper itself should be 10 to 30 seconds long. It is similar to the format of a paid ‘commercial’ advertisement.

Writing for radio needs the same attention to basics as writing for the print media. You have to answer the five Ws and two Hs. Your first sentence (or lead) is very important.

As a general rule of thumb, use the following word count to time a radio broadcast item:

- 10 seconds - 25 words;
- 20 seconds - 50 words; and
- 30 seconds - 70 words.
The best way to check the length of a broadcast release is simply to read it out loud and time it yourself. This serves two purposes: first, it gives a truly accurate idea of the item’s length; and second, it allows the PAO to decide whether or not the news release has "ear-appeal."

Be flexible to the local customs and styles of the host nation. Not all countries adhere to these guidelines and often expand beepers into much longer segments. Work with the media outlets in advance to ensure that you are meeting their logistic and cultural requirements.

• The Public Service Announcement.

The Public Service Announcement (PSA) is a communications vehicle for giving public notice of events that can impact directly on the public, such as exercises in the community, or convoys of military vehicles.

PAOs must establish and maintain good relationships with program producers and station PSA co-ordinators because deadlines and formats vary. PSAs can be created in a variety forms: written news release or even a prepared video or audio product that mirrors a ‘commercial’ advertisement’ format. For TV this is typically 10 or 15 seconds clip with a news lead read over the video for audio background.

PSAs are the closest the media comes to offering ‘free’ advertising. In some nations, public broadcasters must allocate a certain number of hours per month for community service announcements as a condition of their broadcast licence. If this is not a requirement of their nation’s licensing requirements, then a form of payment should not be paid in exchange for the service.

PSAs in many theatres will cross the lines into PSYOPS due to their intent of influencing local national behaviour. Defer to your command legal and finance advisors and higher headquarters PA for guidance before active participation in these endeavours.

10. ACO Print Style Guide.

For continuity across the numerous language writing styles, use the following when writing in English for official ACO publications. These are adapted from the Reuters Handbook of Journalism at http://handbook.reuters.com/index.php/Main_Page.

a. Acronyms.

Avoid if at all possible. Very few are understandable at first reference. Most are only of use to a specialised audience that has seen them several times before. Where possible replace with a noun such as the committee, the organisation, the inquiry.
b. **Book and Film Titles.**

Books, films, plays, poems, operas, songs and works of art: capitalise every word in the title apart from conjunctions, articles, particles and short prepositions, e.g. “The Rise and Fall of the Third Reich”, “The Merchant of Venice”, “Gone with the Wind”. The same is true of radio and television programmes other than news and current affairs, e.g. “American Idol”.

c. **Dates.**

Use the sequence month/day/year, e.g. Iraq’s invasion of Kuwait on Aug. 2., 1990, led to... or the August 2 invasion or the August 1990 invasion. If a specific date is used, put the year inside commas. Spell out months in text but abbreviate them followed by a full stop when they are used with a specific date – Jan.1, Feb. 14, Aug. 5, Sept. 11, Oct. 24, Nov. 5, Dec. 25.

In datelines, use Jan Feb March April May June July Aug Sept Oct Nov Dec with no full stop. If you need to abbreviate for a table use the first three letters of each month: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec. There is no full stop. When spelling out duration, write the tournament runs from May 22 to 24 not runs from May 22-24. Write arrived on Monday not arrived Monday and on Tuesday, on Wednesday, on Thursday rather than yesterday, today, tomorrow. An exception is made for copy in the Americas, where because of subscriber preferences our style is to drop the ‘on’ before days of the week. Write the 1939-45 war but from 1939 to 1945 not from 1939-45. Similarly between 1939 and 1945 and not between 1939-45. Write 9/11, not 9-11.

d. **Non-English Language Phrases.**

Use such phrases or quotes only in exceptional cases, for instance where no generally recognised English equivalent exists. They must always be explained, e.g. Dismissing the libel action, the judge said, “De minimis non curat lex” (a Latin phrase meaning “The law does not concern itself with very small matters”).

e. **Jargon.**

Jargon is specialised language unfamiliar to the average reader, e.g. remuneration, de-escalation, methodology, going forward, thought leadership, downside risks. If you have to convert into better English a word such as confrontation, use the most conservative of its various meanings. Beware the language used by financial professionals. Political and military jargon is riddled with euphemisms to conceal meaning. Unless you are directly quoting someone, turn jargon into clear English. Journalism jargon — newsflow, obits, stringers, paras, rejigs — should not appear in our stories. Words like obituary should be written in full.

f. **Kilometre.**

Use km (no full stop, same singular and plural) at all references, except in a
phrase such as hundreds of kilometres. To convert to miles roughly multiply by 5 and divide by 8, precisely multiply by 0.621.

g. km per hour.

First reference, kph on second and subsequent references.

h. Military.

If in doubt, use the generic term or leave it out. Avoid military jargon, which is particularly impenetrable. However, an attempt should be made to understand it. Jargon is encouraged in the armed forces to reduce the emotional element in the business of killing people, to encourage secrecy and to reduce the number of words in issuing orders. Faced by an inquisitive civilian, the military may deliberately obfuscate or evade admissions of defeat or error with an avalanche of esoteric terms and acronyms. Know them, but do not use them. For example collateral damage, military-speak for striking unintended targets, whether people or buildings. Also, friendly fire, which means attacking your own side by mistake in combat. Do not use either unless in quotes. Prefer plain English. Similarly, avoid military metaphors.

i. Aircraft:

Use aircraft rather than plane. Most airliners and military aircraft are jets so there is normally no need to specify that an aircraft is a jet. Warplane – is one word. Do not use the American term airplane or the term fighter jet. Capitalise but do not put in quotation marks the names of aircraft, e.g. Hercules, Flogger, Raptor. When the number designating an aircraft is preceded by a letter or letters, hyphenate, e.g. Boeing 777 but MD-90, F-117. Be specific when giving aircraft models in economic stories because there are cost differences, e.g. Boeing 777-300 not just Boeing 777. Use makers’ names in the form given in Jane’s All the World’s Aircraft, e.g. MiG-35. Give numerals for aircraft speeds, e.g. Mach 1 not Mach one. Aircraft names use a hyphen when changing from letters to figures, no hyphen when adding a letter to figures, e.g. F-15 Eagle/Tu-22M, but Airbus A300 or A400M are exceptions.

- air base – two words. So also air raid but airspace and airstrike.
- AWACS – Airborne Warning And Control System. Aircraft equipped with search radar, height-finding radar and communications equipment for controlling weapons, generally other aircraft, surveillance and early warning. NATO use modified Boeing 707s with rotating radar domes above the fuselage. Some navies use a smaller AWACS, the twin-engine turboprop E2C Hawkeye with a revolving dome. It flies from aircraft carriers and is built by Northrop Grumman Corp.
- stealth – Do not capitalise stealth.
- strafe – to machinegun or rocket from the air. Do not use in referring to aerial bombing or ground-to-ground attacks.
- UAV – Spell out unmanned aerial vehicle on first reference.
• warplane – One word.

j. Armoured Vehicles:
If in doubt about the name of any of these just call it an armoured vehicle. An artillery piece such as a gun or howitzer may be mounted on tracks or wheels and be self-propelled. Journalists have mistaken self-propelled guns for tanks.

k. Battle:

• battlefield – one word. Also battlefront and battleground.
• battledress – one word.
• BDA – Military shorthand for Battle Damage Assessment. Avoid both unless in quotes. Spell out BDA in brackets if used in a quote.
• ceasefire – one word.
• fighting – This is relative. It ranges from hand-to-hand combat to the risk of an exchange of intercontinental ballistic missiles. Avoid ‘fierce’ fighting and ‘heavy’ fighting unless casualties are known to be heavy or the fire intense. Spell out what is meant. Avoid using ‘infantry fighting’ simply because combatants are on foot. It implies a set-piece engagement not, for instance, a few militiamen jumping garden walls and blasting away with rifles.
• gunbattle – one word. So also gunfire as well as gunman and gunpoint.
• no man’s land – no hyphens.
• offensive – An offensive is more specific than an attack. It is an extensive attack over days, weeks or months often on a wide front or an entire theatre of a campaign or war by air, sea or ground forces and sometimes all three.
• raid – Use only when a force attacks and then leaves an objective, as opposed to occupying it.

l. Military titles:
Ranks should never be abbreviated and should be capitalised when referring to a specific individual. In general, ranks in the armed forces of the main English-speaking countries such as the United States, Britain and Australia are not hyphenated, e.g. Lieutenant Colonel, Rear Admiral, Air Chief Marshal. However, there are exceptions, such as Canada and India, which hyphenate their titles and we should follow the local practice. At second and subsequent reference, use the surname OR his or her rank, e.g. Major General John Brown becomes either Brown or the general (not the major general). Ranks in the non-English-speaking world should be translated without hyphens.
Service components are never capitalised when referring to the service as a whole, e.g. the U.S. army, the French navy. Exceptions are armies that have a unique name, e.g. the Palestine Liberation Army, the Red Army. Capitalise army when referring to a specific formation, e.g. the U.S. 1st Army, the British 8th Army. Use figures for military units: 1st Army not First Army.

- **Air force** - two words unless referring to U.S. Air Force One.
- **Marine** - Capitalise when referring to the U.S. Marine Corps or when referring to its members, e.g. Six U.S. Marines, the U.S. Marines, Marine operations. Do not refer to them as "soldiers".

**Ships:**

- **Warship** – A naval vessel, though not necessarily an armed one. The term does imply the ship is a combatant but a fleet auxiliary – a navy ship carrying stores, fuel and ammunition – is a warship. Warships vary in armament and in size, from a few hundred tonnes to tens of thousands. Identify the type – e.g. fast patrol-boat, corvette, frigate, destroyer, cruiser. Never use battleship as a synonym for warship.

- **Aircraft carrier** – A floating airfield, it carries fixed-wing aircraft on its flight deck and/or helicopters. It should not be confused with other classes of warship, such as frigate, destroyer or cruiser. These may also carry helicopters but they are not aircraft carriers.

- **Assault ship** – A warship designed to support amphibious and air operations against a land-based enemy. They carry helicopters, landing craft, commandos or marines, and may carry amphibious armoured vehicles.

- **Battleship** – A specific class of warship, the battleship is obsolete. It is not to be confused with other classes like corvette, minesweeper, patrol boat, frigate, destroyer. Do not use as a synonym for warship.

- **Submarine** – In naval parlance a boat rather than a ship. A submarine may fight submerged or on the surface, using torpedoes or missiles – the missiles being tactical or strategic. There are two main submarine types depending on the method of propulsion: nuclear and diesel electric.

**Units, formations:**

- **Units, formations, army** – Use capitals when you write the title of a specific unit e.g. the 1st Infantry Division but otherwise say division. Also note that there are many national exceptions to these broad definitions.

- **Squad** – The basic building block of an army, equivalent to the British section of eight soldiers. Three squads/sections form a platoon.
• **Platoon** – The essential tactical unit in any army, capable of patrolling, attacking and defending independently. Usually about 30-strong, an infantry platoon typically has three sections or squads. The platoon may be led by a sergeant or a junior commissioned officer. It may have its own light machinegun and mortar units of two or three men each as well as anti-tank weapons and possibly shoulder-fired anti-aircraft missiles. In a cavalry (armoured) unit the platoon is often called a troop of three or four vehicles. Some armies use troop instead of platoon in their artillery units.

• **Company** – Usually three platoons commanded by a major or captain. In a cavalry unit the term squadron may be used. Artillery may be organised in batteries of six to a dozen guns, rocket-launchers or mortars.

• **Battalion** – The basic building block of any big military formation, a battalion comprises about 500 to 1,000 soldiers, broken down into companies, platoons, squads or sections. It is usually commanded by a lieutenant-colonel. It is the highest single-arm unit in many armies i.e. infantry, armoured or engineer battalion. Higher formations tend to be mixed and comprise, for instance, infantry and tank battalions. Some armies use the term regiment for a tank or artillery battalion.

• **Brigade** – Several battalions or regiments grouped together. Commanded by a brigadier, as in the British Army, or brigadier-general. Some armies confuse reporters by using regiment to mean a brigade.

• **Division** – A group of brigades. Usually commanded by a major-general, it can contain all elements needed to operate independently and is then effectively a small self-contained army.

• **Corps** – Usually at least two divisions. Often commanded by a lieutenant-general.

• **Army** – At least two corps. Tends to be the command of a full five-star general or, a marshal or field marshal. The army group – of several armies – was a feature of the big land battles of World War Two.

• **Infantry** – Soldiers who fight on foot. Traditionally, infantry marched into battle. Mechanised infantry refers to foot soldiers carried to the battlefield in trucks. In modern armies, infantry is carried into battle in armoured vehicles, supported by tanks and artillery.

• **Regiment** – Be careful with this term. Use varies. Find out precisely what is meant in any particular case. It can be used as a synonym for either a battalion or a brigade. Also, a regiment in the British army may have one or more battalions but these rarely serve together as or in a brigade. The 1st battalion of the Royal Halberdiers may be part of an armoured brigade formed for service in the Middle East while the 2nd battalion of the same regiment is in Scotland.

• **Special forces** – Lower case unless referring to a specific unit title. Use with care, as special forces can refer to anything from highly
trained organized units to militia thugs used for diabolical purposes. Also avoid using the subjective terms crack and elite.

- **Squadron** – As with regiment, be careful. Many but not all cavalry (armoured) regiments are broken down into squadrons and troops. Some air forces are organised on the basis of squadrons – each with several flights – and grouped as wings. The term squadron may also refer to a group of ships, a small fleet usually put together for some particular task.

- **Task force** – A force organised for a special operation.

- **Troops** – Use in the plural for large, round numbers – scores, hundreds, thousands – of soldiers, not for small specific numbers. France sent 5,000 troops to the Gulf is right. Guerrillas killed three government troops is wrong. A troop may also be a small unit of armour or guns.

p. **Weapons.**

- **Air-to-ground** – Hyphenate. Also anti-aircraft.

- **Artillery** – Avoid saying “big guns” or “heavy artillery” to dramatise events.

- **SAM** – Spell out on all references Surface-to-air missile.

- **Unconventional weapon** – Avoid. It is often used by “conventional” military forces to refer to effective methods or weapons they do not have, do not understand and generally disapprove of. Using a bamboo spike smeared with excrement may have been unconventional to the U.S. soldier impaled on it, but it came naturally to a Vietnamese irregular. Depending on who is speaking, the term “unconventional weapons” might also mean nuclear, germ or chemical weapons. Be specific.

- **WMD** – The abbreviation for weapons of mass destruction. Spell out on first reference. Usually taken to mean biological, chemical and nuclear weapons.

q. **National names.**

You need not specify a minister’s nationality in the first paragraph of a story that names the country and comes from a dateline in that country. Under a Washington dateline, for example, write: Secretary of State Joan Smith said on Friday the United States would... not U.S. Secretary of State Joan Smith said on Friday the United States would ... There is likewise no need to specify the nationality of groups that obviously are of the nationality of the country datelined. Under an Athens dateline it is Police arrested not Greek police arrested.

r. **Nationalities.**

Nationalities are written out in full and not abbreviated in stories and in sports
results. The only exception is U.S. for United States. Use Britain and British (not United Kingdom or Great Britain). Use The Netherlands (not Holland) and Taiwan (not Chinese Taipei). Distinguish between North and South Korea.

s. **NATO.**

North Atlantic Treaty Organization (Brussels), the Western Military Alliance founded in 1949. The initials may be used by themselves at first reference with the full name given lower in the story.

t. **Security Council.**

The 15-member United Nations Security Council in New York is the body that takes many of the decisions on U.N. action around the world, often through numbered resolutions, e.g. Resolution 649. It consists of five permanent members with the power of veto over any resolution – Britain, China, France, Russia and the United States. There are also 10 non-permanent members of the Security Council, made up of other U.N. countries which serve in rotation, representing different areas of the world. The Security Council presidency rotates monthly, by English alphabetical listing of its member states. The U.N. Security Council becomes the council (lower case) at second reference.

u. **Spelling.**

The general guide for spelling within Allied Command Operations is the Oxford English Dictionary. Copy originating elsewhere should follow British spelling norms. At all times stick to official spellings for American names and titles, such as U.S. Defense Secretary Robert Gates and U.S. Centers for Disease Control and Prevention. Watch out for regional words that non-English language services and clients will find difficult to understand and translate.

v. **Titles.**

Capitalise an official’s title when it immediately precedes the person’s name, but when the title follows the name or is used alone use lower case, e.g.: President Tom Smith but The president said: “I would like to welcome the British prime minister, Janet Courage.”

w. **United Kingdom.**

The United Kingdom comprises Great Britain and Northern Ireland. Great Britain comprises England, Wales and Scotland. Use the full or abbreviated form (UK) only to emphasise the inclusion of Northern Ireland with England, Scotland and Wales or if hard-pressed for headline space.
x. United Nations.

Spell it out at first reference when used as a noun. It may be abbreviated to U.N. in a headline. As an adjective it can be also be abbreviated at first reference, e.g. the U.N. General Assembly, U.N. High Commissioner for Refugees. Security Council: the 15-member United Nations Security Council in New York is the body that takes many of the decisions on U.N. action around the world, often through numbered resolutions, e.g. Resolution 649. It consists of five permanent members with the power of veto over any resolution – Britain, China, France, Russia and the United States. There are also 10 non-permanent members of the Security Council, made up of other U.N. countries which serve in rotation, representing different areas of the world. The Security Council presidency rotates monthly, by English alphabetical listing of its member states.

Some of the main U.N. agencies:

- **UNEP**: U.N. Environment Programme.
- **UNESCO**: U.N. Educational, Scientific and Cultural Organisation.
- **UNHCR**: U.N. High Commissioner for Refugees. If you wish to avoid using this cumbersome title at first reference, use a form of words like a U.N. agency said or the main U.N. refugee agency said, giving the full name lower in the story. Note that there is no U.N. High Commission for Refugees, the correct title of the institution being the Office of the UNHCR.
- **UNICEF**: The acronym can be used for all references to the United Nations Children’s Fund.
- **UNIDO**: U.N. Industrial Development Organisation.
- **UNRWA**: U.N. Relief and Works Agency for Palestinian Refugees.

y. United States.

Spell it out at all references in text when used as a noun. It may be abbreviated to U.S. in a headline. As an adjective it can also be abbreviated at first reference, e.g. the U.S. State Department. Do not use USA except in quoted passages. Do not use the noun America as a synonym for the United States, although you may use American instead of U.S. as an adjective.
Enclosure G  NATO Channel TV and Media Resources

1. NATO Channel TV.

NATO Channel TV is a web-based television channel meant to improve understanding of the Alliance roles. It enables NATO to provide regular news updates and video reports from the different regions where NATO is engaged. Journalist teams are deployed to several NATO operations.

NATO Channel TV is found at www.natochannel.tv. Footage and stories are also available in broadcast quality for journalists and media networks to download. Inquiries into NATO Channel TV coverage can be made through:

Zornitza Venkova  or  Sophie Lambert De Rouvroit
Head of NITV Content, Production and Dissemination  Production officer-NITV
Public Diplomacy Division  Public Diplomacy Division
NATO HQ  NATO HQ
Tel: + 32 2 707 91 40  Tel: + 32 2 707 12 27
e-mail- venkova.zornitza@hq.nato.int  lambert.sophie@hq.nato.int

2. Radio and TV Unit.

The TV and Radio Unit of the NATO PDD operates a television studio and ten radio studios. The studios are used primarily for interviews with the SECGEN, NATO Ambassadors, the NATO Spokesman and high ranking military personnel. The TV studio is fully equipped for broadcasting and is permanently linked to the European Broadcasting Union (EBU-Eurovision, www.ebu.ch) via optical fibre. The radio booths are permanently linked with Belgacom35, enabling interconnectivity with most types of satellites. The radio studios are operated via ISDN36 or analogue telephone lines. Tieline POTS codec37 equipment is available. NATO HQ TV and Radio can be reached through:

Jean-Marc Lorgnier
Head of TV and Radio Unit
lorgnier.jean-marc@hq.nato.int
Tel:  +32-2-707 5006
Fax:  +32-2-707 4249

3. The NATO Media Library.

The NATO Media Library holds an extensive collection of copyrighted photo and video material taken by free-lance photographers and cameramen. This material illustrates NATO Ministerial and Summit Meetings in Brussels and abroad, VIP visits to NATO Headquarters in Brussels, NATO military exercises, and historical events.

35 A company providing telephony, TV and Internet services in Belgium.
36 Integrated Services for Digital Network.
37 A type of audio codec that uses digital signal processing to transmit audio digitally over standard telephone lines (“Plain Old Telephone Service”) at a higher level of audio quality than the telephone line would normally provide in its analog mode.
The Photo Library consists of black and white and colour negatives and 35mm colour slides. Video material exists in VHS and BETA SP formats. Photo and video material is available through:

E-mail: medlib@hq.nato.int or
NATO Media Library, Nb132
NATO Public Diplomacy Division
1110 Brussels, Belgium.
Fax: +32 (2) 707 4249
**Enclosure H  Cross-Cultural Communications**

When preparing PA products and services for local audiences, work closely with the interpreters and cultural advisors. They are there to provide advice and guidance because they know the culture in which they live and work.

However, when using interpreters be aware of potential biases and capability levels. If possible, crosscheck material with multiple interpreters, preferably from different backgrounds or tribes. Also, be careful of using interpreters that have not lived in the country you are working in for many years. There are sometimes issues with how this individual will be received as they represent you or your leadership in public forum. Their return to the country is sometimes looked on as opportunistic or with disdain by the people in the host nation. Many interpreters are not necessarily assigned to the correct tribal region or possess only certain skills (verbal translation, written translation, computer translation, software expertise, etc.).

When preparing for a forum with simultaneous translation, ensure that you and the designated spokesperson have had a chance to work with the interpreter prior to the event. Interpreters who are brought in to translate at the last minute will not be effective. You need to work with an interpreter so that they learn your speaking style and rhythm. A good interpreter should not only translate the language, but also the tone and nonverbal cues.

Remember these simple guidelines when communicating in different cultures:

- When possible, work with a cadre of interpreters to maintain flexibility.
- Ensure you are familiar with the style of your interpreters.
- Use simple words and imagery that do not have room for interpretation.
- Do not use humour. Humour does not translate across cultures well.
- Avoid using terminology or imagery that has historic, religious, political or sexist overtones or interpretations.
- Provide enough information and context to avoid interpretation and misunderstanding.
- Respect and use local language(s) (verbal and non-verbal). Verify that your communications respect local norms.
- Break up text/verbal communications into short statements that can be easily translated.
- Act and communicate as a guest.
- Do not expect that you perception of ‘common sense’ is a universal norm. Accepted norms vary from situation to situation and from culture to culture.
- Remember it will take twice as long to say it in two languages. Plan accordingly. Planning a twenty minute Q&As session through an interpreter will only allow half the questions as in a single language event.
Enclosure I  Public Affairs Leaders’ Mission Checklist

The following is an example of a leader’s checklist to ensure subordinates are prepared for PA missions. The checklist is intended to be altered as the mission dictates.

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<th>Date of Mission:</th>
<th>Unit:</th>
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**Mission Description**

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- Link-up Location
- Link-up Time

- Assigned by
- DTG

**Journalists Analysis (brief back to Officer or NCO in charge):**

<table>
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<tr>
<th>Reverse Planning Timeline</th>
<th>Packing List</th>
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<tbody>
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Reviewed by


### Enclosure J

**Country Codes**

(Source ISO 3166-1, updated May 2013)

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**ACO/ACT - Public Affairs Handbook - 2014**

### Notes

1. Updated May 2013

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**Enclosure K**  

**Lexicon of Terms**

This lexicon, taken from MC 0457/2 and supplemented, groups together the most frequently used terms pertaining to PA work in NATO. PA products are listed separately for ease of use. The terms used here are in the process of being submitted to the MC Terminology Committee to be considered for inclusion in AAP-6 NATO Glossary of Terms and Definitions.

**ACO PUBLIC AFFAIRS AND ORGANIZATIONAL TERMS**

**ACCOMODATION** - The active support of a media visit or embed by a military unit. As some nations do not authorize media embedding, often the term accommodation will be used to refer to the support of civilian media activities.

**ACCREDITATION** - The formal recognition of a journalist or other media representative by an official national entity or international organisation; can also refer to the accreditation card or other document issued to the media representative. Accrediting organisations will physically verify the affiliation of an applicant with a specific new organisation.

**ALLIED COMMAND OPERATIONS (ACO)** - All units, formations and missions under the command of SACEUR. Its headquarters is called SHAPE.

**ALLIED COMMAND TRANSFORMATION (ACT)** - All units, formations and missions under the control of SACT. ACT is headquartered in Norfolk, Virginia, USA and is responsible for, among other issues, NATO military public affairs training.

**ALLIED COMMAND OPERATIONS PUBLIC AFFAIRS OFFICER (ACO PAO)** - Any Public Affairs Officer within the ACO structure, or operating under the command of SACEUR at static HQs, on exercises, missions and operations.

**ACO OPEN SOURCE SYSTEM (AOSS)** - A computer-based media monitoring platform used by SHAPE and any other ACO public affairs staff to monitor the main news agencies and media archives. At the time of writing, AP, Reuters, AFP, and Factiva© as well as a news imagery archive are available, and the system will continue to evolve. On demand, it can also carry out more focused searches for information.

**ARTICLE 5** - The fifth article in the North Atlantic Treaty which stipulates that “The Parties of NATO agreed that an armed attack against one or more of them in Europe or North America shall be considered an attack against them all. Consequently they agree that, if such an armed attack occurs, each of them, in exercise of the right of individual or collective self-defence will assist the Party or Parties being attacked, individually and in concert with the other Parties, such action as it deems necessary, including the use of armed force, to restore and maintain the security of the North Atlantic area.”

**AUDIENCE** - A specified group or persons to whom NATO public affairs efforts are directed.
CHECK AGAINST DELIVERY - Used to inform media that a speech text released prior to it being given (usually provided under embargo) must be compared to the actual speech, which takes precedence and should be used when quoting there from.

CHIEF PUBLIC AFFAIRS OFFICER (CPAO) - The senior Public Affairs Officer in a NATO permanent or field headquarters. The CPAO is the Commander’s public affairs advisor and delegated spokesperson, reporting directly to the Commander. Responsible to plan and implement the PA campaign.

CITIZEN JOURNALIST - A person who independently gathers and reports news, views or opinions using means other than through a media organisation, frequently through social media networks.

CJSOR (COMBINED JOINT STATEMENT OF REQUIREMENTS) - A force catalogue indicating types of capabilities for NATO defence planning scenarios. This catalogue does not deal in specific numbers of troops required to fill minimum manning. Rather, realizing that each nation approaches military capabilities differently with respect to technology, training, and manpower, the CJSOR lists the capability required for a particular mission or task. Ultimately, the CJSOR says what needs to be done and the nations complete the task with what they can offer.

COMMUNITY RELATIONS (COMREL) - One of the three core functions of NATO military PA. COMREL refers to the relationship between military and civilian communities in proximity to NATO installations in the Alliance’s member nations, including the general public, business, service organisations, and other non-media entities.

CRISIS ESTABLISHMENT (CE) - A table setting out the authorised posts for a Crisis Response Organization (CRO) unit, formation or headquarters. The CE is the mechanism for the provision and sustainment of qualified manpower to the HQ.

CRISIS RESPONSE OPERATION (CRO) - all military operations conducted by NATO in a non-Article 5 situation. Crisis response operations can include peacekeeping and peace enforcement, as well as conflict prevention, peacemaking, peace building and humanitarian operations.

DEPUTY SUPREME ALLIED COMMANDER EUROPE (DSACEUR) - Primarily responsible for the force generation effort. Dual-hatted as Commander, European Union military forces.

DIGITAL VIDEO & IMAGERY DISTRIBUTION SYSTEM (DVIDS) - A video distribution and marketing hub that provides a timely, accurate and reliable connection between the media around the world and the military. This capability has been adopted by ACO as the primary tool to provide imagery to both the media and the public.

EMBARGO - An agreement with one or more media representatives or organisations not to publish defined information before a specified date and time. This is usually applied to protect time-sensitive information.
EMBEDDING (MEDIA EMBED) - The act and process of a military unit hosting a media representative for the purpose of reporting operations for more than a 24 hour period. The terms integrating, accommodating and hosting media may also be used.

FACILITIES - Transport, briefings, shelter, communications, power, etc., which enable media to gather (witness, hear) information, record (type, visual, audio) it, and transmit it via commercial or military means.

FLAGS TO POST - The recruiting process which solicits and selects national bids to each post on the CE at OF-5 level and above. For posts at OF-4 level and below the MCC is used.

FREELANCE(R) - An independent journalist not employed continuously on a full-time basis with any one media organisation. They usually sell their work to one or more media organisation(s) on a piece by piece basis during temporary assignments.

FORCEGEN (FG) - The overall process of defining capability requirements then soliciting nations to fill those requirements. Once authorized by the North Atlantic Council, this process is tasked to the DSACEUR.

FORCEGEN CONFERENCE – The meeting between the national military representatives and the DSACEUR to bid and secure positions on the peacetime or various crisis establishments.

GROUND RULES - Conditions mutually agreed in advance with a media representative that govern the terms of an interview or other activity and the use of that information.

INFORMATION ACTIVITIES - Actions designed to affect information and/or information systems. They can be performed by any actor and include protective measures (see MC 422/3).

INFORMATION OPERATIONS (Info Ops) - A military function to provide advice and coordination of military information activities in order to create desired effects on the will, understanding and capability of adversaries, potential adversaries and other NAC approved parties in support of Alliance mission objectives (see MC 422/3).

INITIAL EXERCISE NEWS RELEASE (IENR) - The initial news release formally announcing a NATO military exercise. The responsibility and authority for this rests with the officer scheduling the exercise and is produced in consultation with higher HQ where there are public and/or political sensitivities.

INTERNAL INFORMATION - One of the three pillars of NATO PA. Organisational communication with NATO members, civilian employees and family members of those serving with or affiliated to NATO. It does not include activities of officers or managers for the purpose of informing their staffs of unit or section developments or communications that provide administrative direction. Also referred to as Command Information.
INTERNATIONAL STAFF - The International Staff supports the process of consensus-building and decision-making, and follows up on the decisions of NATO committees. The International Staff includes the Office of the Secretary General, six divisions, each headed by an Assistant Secretary General, and a number of independent offices and is based in Brussels.

INTERNATIONAL MILITARY STAFF - The International Military Staff (IMS) is the executive agency of the Military Committee. It provides staff support to the Military Committee and is responsible for the preparation of assessments, studies and other papers on NATO military matters. The IMS also ensures that decisions and policies on military matters are implemented by the appropriate NATO military bodies. The IMS provides the link between the political decision-making bodies of the Alliance and the NATO Strategic Military Commanders and their staffs.

JOURNALIST - A person employed by a media organisation to gather and report news.

JOURNALISTS IN AREAS OF ARMED CONFLICT - Journalists engaged in dangerous professional missions in areas of armed conflict who do not meet the requirements for designation as war correspondents are recognized under Article 79, Additional Protocol 1, 1977 as ‘civilians’. Journalists who have fallen into the power of the enemy are guaranteed the protections afforded that status under the various Conventions and Protocols. Do not confuse with War Correspondents.

MEDIA - Any organisation or person who gather and disseminate news; also refers to the mediums by which news is transmitted (newspapers, TV, radio, Internet, etc.).

MEDIA ESCORT - A person assigned to accompany journalists and other media representatives.

MEDIA INFORMATION CENTRE (MIC) - One or more centres subordinate to a NATO Media Information Centre (NMIC) that are operating in forward locations.

MEDIA OPERATIONS - All activities pertaining to managing the interaction with the news media; can refer to the function responsible for such activities, such as the ‘media operations section’. For use in this handbook, the terms media operations is synonymous with media relations.

MEDIA OPPORTUNITY - Also called Press Point, Newser, Presser, Media Availability. A chance for media to meet with an organisational spokesperson, usually on camera and often before or after a notable meeting or activity. Is distinguished from a news conference in that the setting in a media opportunity is regarded as more impromptu and less formal, with quite limited time with the spokesperson and not necessarily with a view to imparting “new news.”

MEDIA POOL - News media who mutually agree to gather and share material with a larger group when access to an activity or event is limited, typically when news media support resources cannot accommodate a large number. Some ground rules may be agreed in advance to ensure that different types of media are granted access. In general, the PAO should indicate the availability of the breakdown of
seats available and leave selection of who is in the pool to the media representatives.

MEDI A REPRESENTATIVE - All persons accredited as journalists, including those who directly support the gathering and reporting of news, such as producers, researchers and photographers, excluding drivers, interpreters, or others not directly involved in the news process.

MILITARY COMMAND STRUCTURE –

- **Strategic Level** - At the Strategic level, there are:
  - The Allied Command Operations (ACO), as the single headquarters for operations. Supported by Supreme Headquarters Allied Powers Europe (SHAPE), located near Mons/Belgium, is commanded by Supreme Allied Commander Europe (SACEUR).
  - The Allied Command Transformation (ACT), that takes on primary responsibility for transformational issues and improvements in NATO military capabilities. Supported by HQ SACT in Norfolk (VA)/USA, is commanded by Supreme Allied Command Transformation (SACT).

- **Operational Level** - Within ACO, the Operational level of command is provided by two Joint Force Command (JFCs), providing joint operational HQs under the Deployable Joint Staff Element (DJSE) concept if required. JFCs Brunssum and Naples will each be structured and manned to command up to one major joint operation and two smaller joint operations. DJSEs are Operational level HQ elements designed to be in theatre as the deployed joint staff for an Operational level Commander. Six DJSEs, at appropriate levels of readiness, are provided by the NATO Command Structure (four) and NATO Force Structure (two). Each DJSE consists of a Joint HQ Forward Element, a Joint Logistics Support Group (JLSG) HQ Element, and a Forward Support Element, in order to enable the required level of jointness and deployability. These elements can be tailored for specific operations and will be enabled with capability packages as required.

ACO structure also contains three component commands that provide service-specific headquarters to the Operational level: Allied Land Command – LANDCOM, Izmir (Turkey), Allied Maritime Command – MARCOM, Northwood (Great Britain) and Allied Air Command – AIRCOM, Ramstein (Germany). Although these component commands are routinely subordinated to the joint force commanders, they can be allocated to operations under another Commander as the need dictates.

MILITARY COMMITTEE - The Military Committee (MC) is the senior military authority in NATO. It is the primary source of military advice to NATO’s civilian decision-making bodies – the North Atlantic Council, the Defence Planning Committee and the Nuclear Planning Group and represents an essential link between the political decision-making process and the military structure of NATO. It provides military guidance to the Alliance’s two Strategic Commanders and assists in developing overall strategic policy and concepts for the Alliance. It meets frequently
at the level of Military Representatives (MILREPs) and three times a year at the level of Chiefs of Defence (CHODs). It is chaired by the Chairman of the Military Committee, who is nominated for a three-year term.

NATO MEDIA INFORMATION CENTRE (NMIC) - A public affairs facility established to host and inform journalists and other media representatives in a NATO operations mission or exercise area. A NMIC will normally contain a briefing area, offices for public affairs staff, and should offer telephone, internet and other services to media representatives.

NATO MEDIA OPERATIONS CENTRE (NMOC) - That element of a Public Affairs Office or section established within a NATO body, mission or operation, to deal with day-to-day management of media operations, specifically in response to crisis management.

NATO MILITARY PUBLIC AFFAIRS (PA) - The function responsible to promote NATO’s military aims and objectives to audiences in order to enhance awareness and understanding of military aspects of the Alliance. This includes planning and conducting external communications, internal communications, and community relations.

NEWS CONFERENCE - A group of two or more media purposefully gathered to obtain information from an organisational spokesperson. Implies there is something new or newsworthy to impart; otherwise, use a media opportunity.

NORTH ATLANTIC COUNCIL (NAC) - The principal political decision-making body within NATO. It brings together high-level representatives of each member country to discuss policy or operational questions requiring collective decisions.

PEACETIME ESTABLISHMENT (PE) - A table setting out the authorized peacetime manpower requirement for a standing unit, formation or headquarters. The Crisis Establishment is a similar concept, however, the CE is used only in crisis or contingency operations, such as ISAF or KFOR.

SOCIAL MEDIA - A generic term for many different forms of electronic communication that are made possible through the use of computer-based technologies.

PROPAGANDA - Information, ideas, doctrines, or special appeals disseminated to influence the opinion, emotions, attitudes, or behaviour of any specified group in order to benefit the sponsor either directly or indirectly:

- Black: purports to originate from a source other than the true one.
- Grey: does not specifically identify any source.
- White: disseminated and acknowledged by the sponsor or by an accredited agency thereof.

PSYCHOLOGICAL OPERATIONS (PSYOPS) - Planned psychological activities using methods of communication and other means directed to approved audiences
in order to influence perceptions, attitudes and behaviour, affecting the achievement of political and military objectives. See MC 402/2.

PUBLIC AFFAIRS APPROACH - The level of public profile to be adopted. It may change in time, space and phase of any operation. An approach can be very active, active or reactive, and be different for external and internal audiences. May also be referred to as PA Posture.

PUBLIC AFFAIRS OFFICER (PAO) - A person trained and qualified to practice public affairs. In NATO, a person posted or hired into a position established as a PAO or PAO Advisor.

PUBLIC DIPLOMACY - The totality of measures and means to inform, communicate and cooperate with a broad range of target audiences world-wide, with the aim to raise the level of awareness and understanding about NATO, promoting its policies and activities, thereby fostering support for the Alliance and developing trust and confidence in it. See SG(2003)0876(INV).

PUBLIC DIPLOMACY DIVISION (PDD) - The Division located at NATO HQ Brussels, and headed by an Assistant Secretary-General, responsible to explain the NATO organisation’s policies and objectives to the public.

REGISTRATION - The process of confirming the credentials of a journalist or other media representative. The media representative may be required to fill out a registration form and provide proof of identity and affiliation with a news organisation. NATO may issue a photo-registration card to facilitate access.

REPLY (RESPOND) TO QUERY (RTQ) - The process of documenting a journalist’s questions and queries, staffing a response and replying to the journalist.

SUPREME ALLIED COMMANDER EUROPE - Responsible for the overall command of NATO military operations and conducts the necessary military planning for operations, including the identification of forces required for the mission and requesting these forces from NATO countries, as authorised by the North Atlantic Council and as directed by NATO’s Military Committee. He makes recommendations to NATO’s political and military authorities on any military matter that may affect his ability to carry out his responsibilities. He has direct access to the Chiefs of Staff of NATO member countries and may communicate with appropriate national authorities, as necessary, to facilitate the accomplishment of his tasks. In the case of an aggression against a NATO member state, SACEUR, as Supreme Commander, is responsible for executing all military measures within his capability and authority to preserve or restore the security of Alliance territory. SACEUR is dual-hatted as Commander U.S. European Command.

SUPREME ALLIED COMMANDER TRANSFORMATION (SACT) - Commands at the strategic level for the transformation of NATO’s military structures, forces, capabilities and doctrines in order to improve the military effectiveness of the Alliance. The SACT is responsible for NATO’s training and education programmes, managing commonly funded resources allocated for NATO’s transformation
programmes and supporting the exercise requirements of Allied Command Operations.

SECRETARY GENERAL (SECGEN) - The senior international statesman nominated by the member nations as Chairman of the North Atlantic Council, Defence Planning Committee, Nuclear Planning Group and of other senior committees. He also acts as principal spokesman of the Organisation, both in its external relations and in communications and contacts with member governments.

SECURITY AT THE SOURCE - The practice of protecting sensitive or classified information where it originates. In PA, this means ensuring that media representatives are not unintentionally exposed to sensitive or classified information and cannot intentionally or unintentionally report it.

SUPREME HEADQUARTERS ALLIED POWERS EUROPE (SHAPE) - NATO’s strategic military headquarters, based in Mons, Belgium, under the command of SACEUR. SHAPE is the headquarters element for Allied Command Operations.

SHAPE PUBLIC AFFAIRS OFFICE - Headed by the ACO Chief Public Affairs Officer (CPAO)

SOCIAL MEDIA NETWORKS - Networks designed for the dissemination of information and messages through social interaction using Internet web-based technologies, often leading to conversational debate.

(Official) SPOKESPERSON – Commanders and Chief PAOs at all levels are the official primary and secondary spokespersons for their command or unit. As such, they are empowered to interact with the media regarding their command or unit in an official capacity and should be quoted by name.

(Designated) SPOKESPERSON - An individual designated by a Commander empowered to interact with the media on his/her behalf. This is commonly used to deal with routine, approved responses to media questions, or by Subject Matter Experts when required to clarify an issue. They should be quoted by name.

STRATEGIC COMMUNICATIONS (STRATCOM) - The coordinated and appropriate use of NATO communication activities and capabilities - Public Diplomacy, Public Affairs, Military Public Affairs, Info Ops and PSYOPS – in support of Alliance policies, operations and activities, and in order to advance NATO’s aims (see P0(2009)0141).

WAR CORRESPONDENT - A ‘war correspondent’ is a journalist who has been authorised by, and issued an identity card from, a national armed force to accompany that force. War correspondents that have fallen into the power of the enemy must be accorded the status of ‘prisoner of war’ and are guaranteed the protections afforded that status under the various Conventions and Protocols.
PA PRODUCTS

BACKGROUNDERS - An explanation of an issue, activity or program usually to provide context and perspective for journalists. Can refer to a product, generally a written piece, or to a verbal briefing and/or presentation by a spokesperson.

FACT SHEET - An overview of data and information on a specific topic. Generally is a collection of factual information as reference material, and short on the effort to impart explanations.

IMAGERY - All materials that identify NATO personnel, equipment or activities through the use of visual images.

INTERNET POSTING - The process of loading a presentation or product to a publicly accessible server and creating the links required to make the item publicly ‘live’.

MEDIA ADVISORY - An alert to inform media agencies of an upcoming newsworthy event or activity.

MEDIA LINES - Also called Talking Points and/or Messages. Organizationally approved responses to an issue for use by spokespersons when dealing with media.

MASTER MEDIA MESSAGES - Overarching, key 3-5 points developed by a higher political or military authority and incorporated into the products and activities of subordinate organisations. Ultimately, reduces even the most complex of issues into a manageable number of remarks of sound bite-length.

NEWS RELEASE - Information designed to notify audiences, particularly media, of an event, issue or activity that is newsworthy, and generally, something that has just happened or is just about to happen. Usually provides an organisational position, view and/or statement.

OPED - Originating in print journalism, op-ed is an abbreviation of ‘opposite the editorial page’, (often mistakenly thought to mean opinion-editorial). It refers to an article that expresses the personal opinions of a named writer not normally on the editorial staff of the publisher. These are different from editorials which are often unsigned and written by editorial board members.

PUBLIC AFFAIRS GUIDANCE (PAG) - Addresses emerging public affairs issues or issues likely not covered by existing plans or guidance, and issued as required by CPAOs. At a minimum, PAG will summarize the issue, identify lead organisation(s), name spokespersons, list messages, and provide coordinating instructions.

PUBLIC AFFAIRS PLAN - Details relating to the planning and conduct of a PA-related activity; in effect the ‘execution’ paragraph detailing what will be done, where, when, how and by whom. Can be an annex to an operations or contingency plan or a stand-alone product.
PUBLIC AFFAIRS STRATEGY - A document that provides a broader public affairs approach that sets overall themes and goals for an organisation or initiative. Should include master messages. Action-oriented PA plans derive their guidance from PA strategies approved by higher authorities.

QUESTIONS AND ANSWERS (Q&As) - A document that provides spokespersons with organisationally approved lines to a series of questions expected from media.

STATEMENT - Remarks by the speaker at the event, usually to public audiences.
BLOG AND SOCIAL MEDIA TERMS

**Autocasting** – Automated form of podcasting that allows bloggers and blog readers to generate audio versions of text blogs from RSS feeds.

**Blog** – Websites where information is posted on a regular basis. Content varies widely, from personal diary-type minutiae to sustained discussion of politics, hobbies or other interests. Some blogs are a “grab bag” of topics, while others focus on a particular subject.

**Blog client (weblog client)** – Is software to manage (post, edit) blogs from operating system with no need to launch a web browser. A typical blog client has an editor, a spell-checker and a few more options that simplify content creation and editing.

**Blogger** - Person who runs a blog. Also blogger.com, a popular free website for blog hosting.

**Blogroll** – List of hyperlinks to other blogs or websites the author of a particular blog finds useful or informative to their readership. Inclusion in a blogroll may or may not imply personal endorsement by the blog author of the views or information found in the linked site. Some bloggers are more consistent than others at providing access to opposing or alternate points of view.

**Blogstorm** – When a large amount of activity, information and opinion erupts around a particular subject or controversy in the blogosphere, it is sometimes called a **blogstorm** or **blog swarm**.

**Blogosphere** - All blogs, or the blogging community in general. Also called blogistan or, more rarely, blogspace.

**Blog site** - The web location (URL) of a blog, which may be either a dedicated domain, a sub-domain, or embedded within a web site.

**BlogThis** – Pioneered by Blogger.com, BlogThis links on a blog allow the reader to automatically generate a blog entry based on the blog entry he/she is reading, and post to his/her blog.

**Instalanche** – Sudden spike in inbound traffic to a website caused by a link posted from a high-profile blog. Nicknamed for the ‘Instapundit’ website, which covers a wide variety of subjects and frequently drives traffic to blogs that might otherwise have remained relatively obscure.

**Mainstream media (often abbreviated MSM in discussion threads)** – Term frequently used by bloggers to refer to traditional media such as newspapers and television. As blogging itself becomes more mainstream, some have begun to use the term ‘legacy media’ to refer to the older forms of mass communication.

**Milblog** – Term for blogs written by members or veterans of any branch of service – i.e. Army, Navy, Air Force, or Marines. A contraction of military and blog.
Permalink - The unique URL of a single post; used when you want to link to a post somewhere.

Ping – The alert in the TrackBack system that notifies the original poster of a blog post when someone else writes an entry concerning the original post.

Podcasting - Contraction of ‘iPod’ and ‘broadcasting’ (but not for iPods only). Posting audio and video material on a blog and its RSS feed; for digital players.

Post - An item posted to a blog. It can be an item, news, photo or a link.

RSS – Really Simple Syndication – Web-based information distribution system that allows instant content flow to websites that choose to subscribe to a particular feed source.

RSS aggregator – Software or online service allowing a blogger to read an RSS feed, especially the latest posts on his favourite blogs. Also called a reader, or feed reader.

RSS feed – The file containing a blog’s latest posts. It is read by an RSS aggregator/reader and shows at once when a blog has been updated. It may contain only the title of the post, the title plus the first few lines of a post, or the entire post.

Sock Puppet – Online alias used by an author to disguise their identity or to create the impression of wide support for a position.

TrackBack – A system that allows a blogger to see who has seen the original post and has written another entry concerning it. The system works by sending a ‘ping’ between the blogs, and therefore providing the alert.

URL – Universal Resource Locator. The ‘address’ of a website, i.e. www.shape.nato.int.
## List of Acronyms

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<td>AAR</td>
<td>After Action Review</td>
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<td>Akademie der Bundeswehr für Information und Kommunikation</td>
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<td>ACO Strategic Management Plan</td>
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<td>AVE</td>
<td>Advertising Value Equivalence</td>
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<td>BPAOC</td>
<td>Canada’s Basic Public Affairs Officers Course</td>
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<td>CAT</td>
<td>Crisis Action Team</td>
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<td>CBRN</td>
<td>Chemical, Biological, Radiological and Nuclear</td>
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<td>Commanders Critical Information Requirements</td>
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<td>Canada’s Defence Public Affairs Learning Centre</td>
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<td>Weapons of Mass Destruction</td>
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<tr>
<td>WSV</td>
<td>Weapon Systems Video</td>
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</table>
Comments and recommendations for the ACO/ACT Public Affairs Handbook are welcome. Please submit comments, recommendations and additional products or annexes using the following matrix to:

Allied Command Operations Public Affairs  
B-7010 SHAPE  
Belgium  
Attention: Chief Public Affairs Officer

Email: shapepao@shape.nato.int

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