

3 January 2023

MC 0458/4 FINAL (INV)


SECRETARY GENERAL, NORTH ATLANTIC TREATY ORGANIZATION

FINAL DECISION ON MC 0458/4

NATO EDUCATION, TRAINING, EXERCISES AND EVALUATION POLICY

1. On 15 Dec 22, under the silence procedure, the MC approved MC 0458/4 – NATO Education, Training, Exercises and Evaluation Policy.
2. The document is now forwarded to the Council for notation.
3. The document supersedes MC 0458/3 FINAL and clears IMSWM-0433-2019 (INV) and all SDs thereto.

FOR THE MILITARY COMMITTEE:



3 January 2023 at 16:41
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NOTE: This Final Decision Sheet shall now be attached to MC 0458/4 as the top sheet. The page numbering of the complete document when this decision is attached is as follows:

MC 0458/4 FINAL (INV)	1 Page
MC 0458/4	47 Pages

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NATO UNCLASSIFIED

MC 0458/4

NATO

EDUCATION, TRAINING, EXERCISES AND EVALUATION (ETEE)

POLICY

NATO UNCLASSIFIED

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PART 1: STRATEGIC CONTEXT AND PURPOSE

BACKGROUND

1. NATO's fundamental and enduring resolution is the unity of Alliance efforts for collective defence and for the preservation of peace and security. Published in 2019 and nested within Alliance policy on Deterrence and Defence, Projecting Stability, and the Fight Against Terrorism, NATO's Military Strategy (NMS)¹ supports NATO's three core tasks Deterrence and Defence, Crisis Prevention and Management, and Cooperative Security (CS). Accordingly NMS relies on a Military Instrument of Power (MIoP)² that is capable of defending the integrity of the alliance, delivering effective deterrence, providing security beyond SACEUR's Area of Responsibility (AOR) and maintaining a decisive military advantage for the Alliance. One way to fulfil this collective commitment is to conduct Education, Training, Exercise and Evaluation (ETEE) activities.

2. The NMS is taken forward through the implementation of two significant military strategic capstone concepts:

a. The Concept for the Deterrence and Defence of the Euro-Atlantic Area (DDA) provides a single, coherent framework to deter and defend against the Alliance's main threats, as described in the NMS, in a multi-domain environment, and will strengthen our preparedness to address pervasive instability challenges and strategic shocks.

b. The NATO Warfighting Capstone Concept (NWCC) provides a long-term vision for developing and maintaining NATO's decisive military edge. Through its implementation, we will ensure that the Alliance continuously develops its military and technological advantage, as the character of conflict evolves.

3. The DDA and the NWCC impact ETEE, since the full implementation of these concepts will require the development of high readiness, deployable, interoperable and sustainable forces equipped, trained, exercised and commanded to meet NATO requirements for multi-domain operations.

AIM

4. To provide direction and guidance to the providers and participants in NATO ETEE activities, in support of the three core tasks, the NMS and its supporting strategic capstone concepts.

SCOPE / APPLICABILITY

5. This policy provides Allies and subordinate commands the direction and guidance necessary to execute NATO ETEE while providing Partners³ and Non-NATO Entities (NNEs⁴) with the information necessary for cooperation with NATO in ETEE activities.

1. See Annex B, References A, B and C.

2. See Annex B, Reference A.

3. Refer to definition in Annex E, Page E-8.

4. Refer to definition in Annex E, Page E-7.

6. The spectrum of NATO ETEE activities includes individual and collective aspects described as follows:

- a. Education: The systematic instruction of individuals that will enhance and develop their knowledge, skills and competencies to perform duties and tasks associated to a post/role. It is the developmental activity enabling individuals to make a reasonable response in any situation, including unpredictable ones (mind-set).
- b. Training: Individual training is the development, improvement and preservation of the skills and knowledge necessary to perform specific duties and tasks. Individual training is a learned response to a predictable situation (skills). Collective Training is designed to prepare teams, units and other elements to perform military tasks in accordance with defined standards. Collective training includes procedural drills and practical application of doctrine, plans and procedures to acquire and maintain collective tactical, operational and strategic capabilities.
- c. Exercise: A military manoeuvre or simulated wartime operation involving planning, preparation, and execution for the purpose of training and evaluation.
- d. Evaluation: The structured process of examining activities, capabilities and performance against defined standards and criteria.

7. The education, training, and exercising of personnel and forces allocated to NATO remains a national responsibility. In support, NATO has the role of setting ETEE standards and assisting and ensuring that the NATO Command Structure (NCS) and NATO Force Structure (NFS) are prepared for their role in current and future missions. It reflects and is aligned to the NMS and its supporting strategic capstone concepts. Complementary level of detail is provided in Bi-SC Directives.

8. While Allies maintain sovereignty of their ETEE doctrine and activities, this policy provides directives and guidance, based on NATO agreed standards⁵, to enable interoperability among Allies and with NCS/NFS. As such, NATO ETEE Policy is also intended to inform their respective national ETEE programmes to support the achievement of wider Alliance objectives.

9. In line with NMS, NATO's Partner capabilities, forces, capacities, and interaction⁶ with NNEs including those provided through strategic relationships with international and regional organizations (such as the UN or the EU) are of great importance as complementing (but not replacing) Alliance capabilities. Therefore, Partners and NNEs cooperation with NATO in ETEE activities requires a dedicated process which is explained in Annex A.

10. This Policy does not apply to the NATO High Level Exercise Programme (HLEP), including NATO Crisis Management Exercises (CMX), Short Notice Exercises and Scenario Based Discussions. The NATO Military Authorities (NMAs) will participate in the planning and conduct of NATO Political-Military Exercises, in accordance with proposals and general arrangements approved for each exercise by the North Atlantic Council (NAC).

5. A NATO standard is a standard developed and promulgated in the framework of the NATO standardization process. See AAP-03.

6. See Annex E, Page E-6.

PART 2: GUIDING PRINCIPLES

11. NATO ETEE provides coherence from capacity and capability development to NATO-led operations. It drives the development of individual and collective competencies, contributes to deterrence, and pushes innovation. NATO ETEE activity provides a continuous, robust menu of activity that when synchronized with Strategic Communications (STRATCOM) efforts, effectively contributes to achieving Military Strategic Objectives (MSO) described in the NMS. Alliance peacetime activities form an essential part of deterrent messaging; therefore, they must be consistent with and a demonstration of defence actions in crisis and conflict. The majority of military activity in peacetime is planned and executed by Nations, which requires improved coordination of training and exercise activities, to ensure vigilance and strengthen deterrence messaging, while meeting the demand to ensure a ready and capable force for today and the future. NATO ETEE contributes to expanding the reach of the Alliance, both inside and outside of SACEUR's AOR, through experimentation, wargaming⁷, training, exercising and integrating Allies strengths within the Alliance and, when appropriate, with Partners. Allies are encouraged to offer and participate in NATO ETEE activities to demonstrate commitment to Alliance security across the AOR. To allow the most efficient contribution to NATO's deterrence and defence and contribute to the exercises common picture, Allies should maintain awareness of National ETEE activity and its impact on peacetime management within SACEUR's AOR. Therefore NATO ETEE should be:

- a. Ready and Proficient: The primary purpose of NATO ETEE is to ensure continued coherence, effectiveness and efficiency of the MloP. The contribution of National forces is the foundation of the MloP that NATO ETEE builds upon to ensure the development of integrated NATO military capability at the tactical, operational and strategic level. In doing so, NATO ETEE contributes to produce a MloP that is persistent and scalable, and stands ready to defend any Ally.
- b. Interoperable: Interoperability is the ability to act together coherently, effectively and efficiently to achieve Allied tactical, operational and strategic-objectives. It is of critical importance as a required key element of both coherence and cohesion of the MloP and the main factor for enabling force integration. Education and Training (E&T) are appropriate venues to practice Standing Operating Procedures (SOP) and validate operational implementation of doctrine, tactics, procedures and material standardization. Interoperability is built through alignment of Allies' education with frequent exchanges of personnel to converge collective thinking, and broaden the foundation of common values and approaches.
- c. Realistic: The MloP requires effective education and realistic training and exercises to be prepared for future operations, missions and activities. NATO must train as it intends to fight. ETEE efforts seek to address the realistic threats and challenges stemming from the strategic context that reflect the nature and complexity of the main threats.
- d. Adaptive and Innovative: Wargaming experimentation, trials, demonstrations⁸, testing and exercising of new systems, concepts and tactics must be a priority to ensure NATO forces continue to be capable of dominating the battlespace of

7. See Annex B, Reference D, Paragraph 15.

8. See Annex B, Reference D.

tomorrow. Continual adaptation and modernization define the very nature of the Alliance as a high-end military, and multi-dimensional learning organization⁹. NATO ETEE is designed to allow changing inputs whether they are new political guidance, lessons learned, the introduction of new technologies or a change of focus onto an emerging or newly identified threat as identified by NATO agreed intelligence documents. An extensive education network, the collective efforts to explore the use of new technologies, comprehensive evaluation and lessons learned programme are strengths of NATO ETEE.

e. Comprehensive: NATO ETEE activities should reflect the Alliance's 360 degree approach¹⁰, ensuring support to the three core tasks and delivery of the required unity of effort for effective, complex, multi-domain operations¹¹.

f. Transparent: Transparency of ETEE activities across the Alliance, facilitates alignment between Allies; therefore, Allies are encouraged to declare their ETEE activities, especially those supporting NMS. Allies are further encouraged to support NATO efforts to achieve increased visibility on Allies readiness. This enhances SACEUR's visibility and contributes to better synchronization, increased deterrent effect for the Alliance, and demonstrates NATO's ability to counter any threat in all directions.

g. Flexible: Due to an ever changing and complex security environment, NATO ETEE activities, processes and procedures should be accommodating enough to adjust to the Alliance's training needs and requirements. This allows for incorporation of new guidance, concepts, capabilities and the development of individuals and forces that will retain a decisive advantage for the Alliance.

h. Aligned: Alignment, synchronization and interoperability are inherent requirements of NATO ETEE. Alignment facilitates affordability, sustainability and the effective achievement of capability within the MloP.

i. Cost Effective and Resource Efficient: NATO ETEE activities should be managed with cost effectiveness as a guidepost and in line with NATO policies, procedures and guidelines.

j. Values Based: NATO ETEE activities should be conducted in accordance with the NATO Code of Conduct¹² and in-line with unity, solidarity, and cohesion among the Allies.

9. See Annex B, Reference A, Paragraph 62 and Reference E, Paragraphs 11 and 12.

10. See Annex B, Reference A, Paragraphs 5 and 22 and Reference F, Enclosure 1, Page 2.

11. In accordance with References A, D Paragraph 12 and F.

12. See Annex B, Reference G, with revisions by Reference H and Reference I.

PART 3: EXECUTION

OVERVIEW: GLOBAL PROGRAMMING APPROACH

12. To accomplish the aim of this policy, NATO first relies on Allies for the education and training of Nation's personnel and forces that will become part of the NCS/NFS. The premise that NATO trains command and control, while Nations train forces, remains generally valid. However, in support of Allies training efforts, NATO applies the Global Programming Approach that enables Allied forces training, integration and potential deployment for NATO operations, missions and activities. It also allows NATO and Nation's ETEE efforts to synchronize all available opportunities for developing ready forces.

13. The Global Programming Approach consists of three interrelated components that serve to coordinate and synchronize training and education efforts to enhance readiness, improve deterrent effects and contribute to transformational development; the Governance Structures, the Development Methodology, and the Production Planning Process (PPP) (see Figures 1, 2, and 3 below). To ensure the effectiveness of the Global Programming Approach and assure that all declared forces are prepared to meet required operational priorities, NATO ETEE applies Quality Assurance (QA)¹³ and evaluation programmes for the NCS/NFS.

GOVERNANCE STRUCTURE

14. To lay the foundation for Global Programming (GP), the Strategic Commands (SCs) propose and maintain a list of training categories called "Disciplines" that will focus training and education efforts to achieve NATO requirements. The Military Committee (MC) will approve annually the NATO Education and Training "Disciplines" list. These disciplines can be conceptualized in terms of warfighting functions, domains, operations, capabilities or whatever framework is deemed necessary to provide the focus required to drive NATO ETEE activities. The list of disciplines facilitates coordination and synchronization of training and education efforts. Specific education and training requirements which can be more efficiently managed independently, will not be grouped within a discipline.

15. The SCs will review annually the list of disciplines according to adequate justification that reflects priorities, resources, responsibilities and expertise. Proposals of new disciplines will be based on performance gap analysis, identification of potential NATO ETEE requirements, a match of criteria and determination of the most efficient management of the proposed discipline as a single one. For each established discipline, a governance structure composed of one Requirements Authority (RA), a Department Head (DH)¹⁴ and a representative from HQ SACT will be established (Figure 1), as described below.

- a. Requirements Authority (RA): The RA is responsible, based on existing MC and NAC guidance, for identifying and managing the specific NATO ETEE Requirements (NETR) associated with the discipline. The RA verifies needs and provides input concerning changes to NATO concepts, doctrine, policy and procedures. The RA will annually review the requirements, consider lessons learned and experience from operations as well as consider the requirements based on new developing capabilities and emerging threats. RAs are appointed by SACEUR from within ACO. Exceptions to this will be proposed by SACEUR for MC approval.

13. See Annex B, Reference J, Paragraphs 4 and 5.

14. ACT can propose more than one DH on a case by case basis; a Lead DH will be identified.

b. Department Head (DH): The DH supports HQ SACT's responsibility for translating NATO E&T requirements into solutions for the individual and collective training spectrum. Furthermore, the DH is responsible for the coordination of the solutions. DHs are appointed by SACT. HQ SACT selections of DHs outside of the NCS require MC approval or, for a Partner or NNE, MC endorsement and NAC approval.

c. HQ SACT representative: HQ SACT supports the centralized coordination and decentralized execution of NATO E&T management activities and by appointing the Discipline Point of Contact (POC).

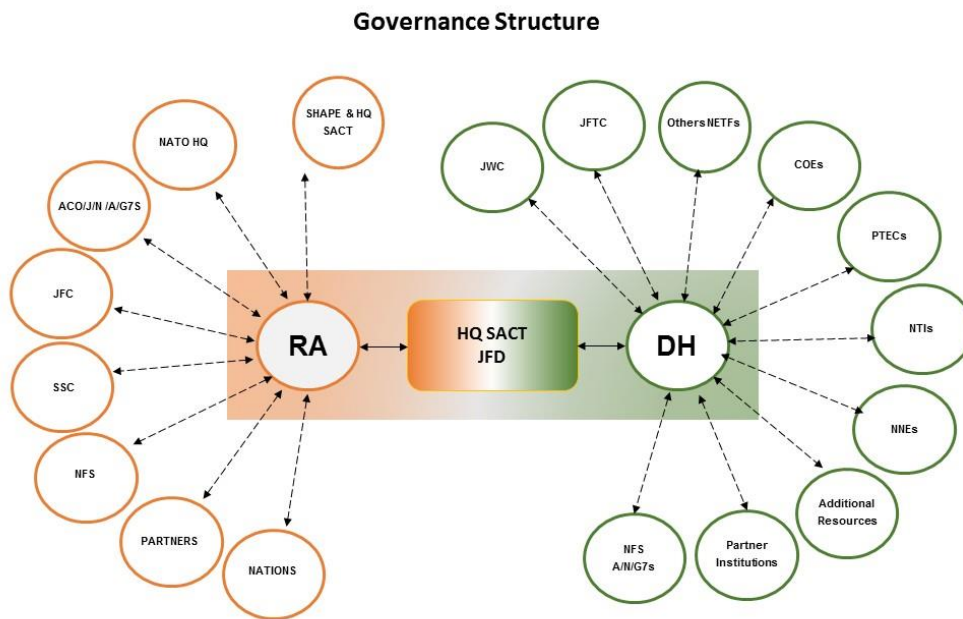


Figure 1 – Governance Structure

DEVELOPMENT METHODOLOGY

16. NATO's methodology for the development of a discipline is a thorough process intended to vet a discipline until it can be integrated into the annual discipline approval process. The development methodology is critical to ensuring that disciplines accomplish their intended purpose in accordance with the strategic guidance.

17. The Discipline development methodology (Figure 2, below) defines the different steps which have to be taken for a NATO E&T Discipline to emerge until it reaches its annual routine. Through the development methodology specific roles are assigned and the following ETEE activities take place:

a. Training Requirements Identification (TRI). Proposals of new disciplines, that capture NATO's emerging political and military requirements, will be assessed through the TRI. A TRI is a Bi-SC process; it is comprised of a performance gap analysis, identification of potential NATO ETEE requirements, a match of discipline criteria and determination of the most efficient management of the proposed discipline as a single discipline or not. The submitted TRI report will be assessed by HQ SACT and result in a MC level decision.

- b. Strategic Training Plan (STP). Based on an MC approved discipline, the STP is a holistic integrator, which captures individual and collective NATO training requirements at all levels. The Bi-SC proposed STP, with the selected governance structure, is submitted for MC approval¹⁵. Allies retain the right to request a case-by-case MC endorsement and NAC approval if there is a perception of political sensitivity.
- c. Training Requirements Analysis (TRA)¹⁶. Based on an approved STP, the TRA will map identified requirements to existing solutions and identify deficiencies in performance.
- d. Training Needs Analysis (TNA)¹⁷. The TNA is a process led by the DH to identify solutions to skill deficiencies.
- e. Annual Discipline Conference (ADC). The ADC is the forum for annual sustainment of the discipline supporting NATO E&T and updating of requirements solutions IAW SACEUR’s Guidance for Education, Training, Exercises and Evaluation (SGE)¹⁸. The results of the ADC are captured in the Discipline Alignment Plan (DAP) signed by HQ SACT/JFD.

18. Through the development methodology, required disciplines are validated and provide the input needed to conduct the PPP¹⁹.

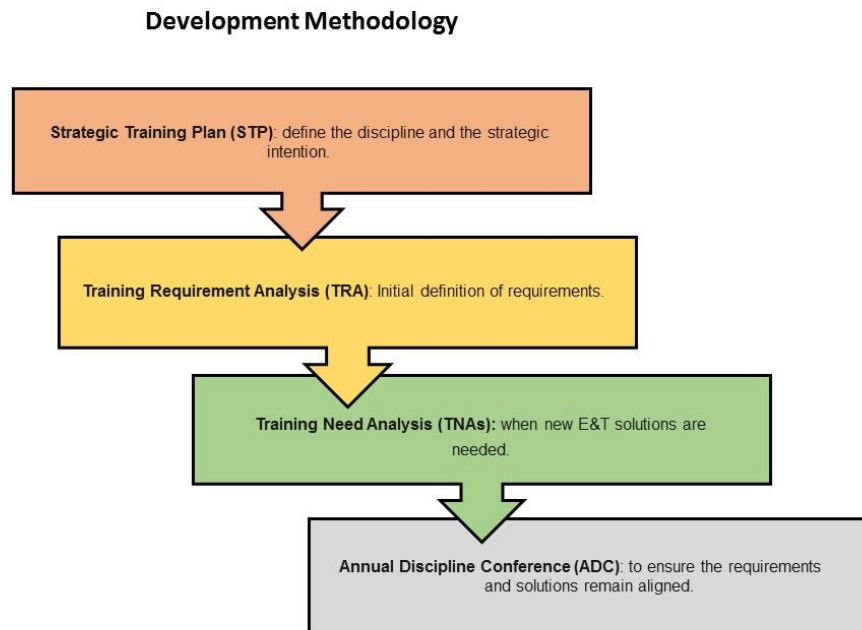


Figure 2 – Development Methodology

15. If Partners or NNEs play a role in the STP, those roles will be specified.
 16. See Annex B, Reference J, Page A-5.
 17. See Annex B, Reference J.
 18. For additional details see Annex B, Reference K.
 19. Annex B, Reference J explains the Development Methodology and PPP in detail.

PRODUCTION PLANNING PROCESS (PPP)

19. Operational requirements and missions evolve, requiring NCS/NFS to remain ready, responsive, adaptable and interoperable at all times. While the Development Methodology is focused on a single discipline, the PPP (Figure 3, below) employed by NATO takes a more holistic approach. The PPP is intended to provide the Alliance with the flexible planning process necessary to achieve success through a synchronized annual planning effort that encompasses all disciplines. To accomplish the intent of the PPP, the process is split into two distinct but connected training audience echelons within the training continuum: Education and Individual Training (E&IT) and Collective Training and Exercises (CT&E). The PPP for both E&IT and CT&E consists of sequence of tailored planning board meetings. The PPP produces updates of NATO ETEE related documents, most notably the Individual Training and Education Programme (ITEP) and the Military Training and Exercise Programme (MTEP). In addition to synchronizing ETEE activity, a secondary objective of PPP efforts is to inform Allies, Partners, and NNEs at least two years in advance, in detail, and no less than four years in outline of planned ETEE activities to enable all stakeholders ETEE planning efforts.

20. The PPP is driven by NCS/NFS training requirements derived from multiple sources²⁰. The PPP engages with multiple different actors, to include representation from Allies, Partners, NNEs, NCS, NFS, RAs, DHs and E&T facilities. NATO standards establish enduring training baselines while SGE provides the most pertinent ETEE guidance. The SGE is applicable to the NCS/NFS and other assets available to NATO²¹. Combined with evolving Political Guidance (PG) and NMA direction and guidance, SGE provides HQ SACT and SHAPE the direction necessary to effectively schedule, coordinate and resource ETEE activity. SGE is SACEUR's periodic long-term extended assessment of requirements to provide context for both his Annual CT&E Directive and MTEP/ITEP development process which together account for training of the NATO total force.

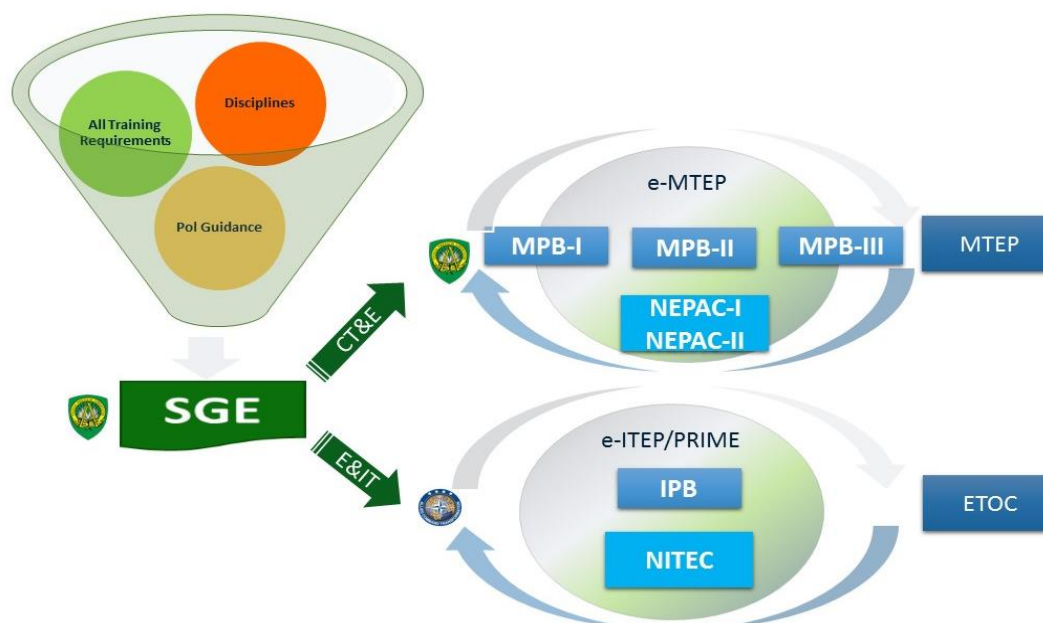


Figure 3 – Global Programming

20. Political Guidance (PG), Annex B Reference A, Reference L, Long Term Commitment Plan (LTCP), relevant MCMs, Operations Planning and all NATO Military Authorities principal work strands for example.

21. The SGE and the Annual CT&E Directive could be applicable to NETFs, CoEs, and PTECs in accordance with relevant policies.

EDUCATION AND INDIVIDUAL TRAINING (E&IT)

21. The focus of NATO's Education and Individual Training Programme is to ensure that NCS/NFS personnel have the knowledge, skills and attitudes required to perform assigned duties, within NATO's Level of Ambition (LoA)²². The principal drivers for NATO E&IT are the NCS/NFS individual job descriptions, coupled with SGE and any NATO pre-operational deployment training requirements. ITEP planning boards use the aforementioned collective guidance as the basis for generating the NATO Core Individual Training Programme captured in the ITEP.

22. The ITEP process, including ITEP Planning Boards (IPBs), and the NATO Individual Training and Education Conference (NITEC) serve as venues to synchronize NATO and Allies training programmes toward NATO objectives. Training can be provided through residential courses, distance learning venues and Mobile Training Solutions (MTS). Additionally, NATO offers a variety of NATO-certified courses, which are available to personnel from contributing Nations who are identified to deploy. The final output of collective ITEP Process is the publication of all E&IT courses in the NATO Education and Training Opportunities Catalogue (ETOC)²³.

23. NATO ETEE activities are to be conducted in the most effective and efficient manner. The implementation of specific NATO ETEE programmes, plans, activities and events will consider the optimal usage of the available resources. NATO will continue utilizing NETFs, NATO-accredited COEs²⁴ and NATO recognized PTECs in accordance with their capabilities and potential within the scope of their mandates, their MC/NAC approved concepts and policies and within their respective area of excellence. NATO will also utilize National/Multinational Training institutions (MNTI/NTI) from NATO nations, and other education and training facilities from partners and NNEs that are in compliance with NATO procedures and standards, as complementary training assets to fulfil recognized NATO ETEE requirements. NATO will utilize NETFs, COEs, PTECs, NTIs, and other NNE education and training facilities as outlined above, to provide support to the requested and approved education and training requirements of nations, the NCS and the NFS. Control of these organisations lies with different authorities, but the responsibility for seeking a NATO unified effort to develop effective, efficient and affordable education and training solutions lies with HQ SACT.

24. Given the variety of institutions engaged in the delivery of NATO E&IT, a means to assure the quality of E&IT is essential. E&IT Quality Assurance will provide a mechanism by which NATO can be assured of a consistent level of quality in activities provided in support of NATO by accredited E&T facilities. In order to maintain the "NATO approved" certification status, courses must comply with current policy and guidance and apply agreed NATO standards. More specifically, as the environment, threats, circumstances, tactics and procedures evolve, E&IT activities must also evolve. Regular reviews and certification of courses advertised in the ETOC, based on a substantiated recommendation from the discipline governance structure, will be conducted.

22. Part 3 of Political Guidance for Defence Planning 2019 describes the NATO LoA.

23. ETOC which is part of eITEP is a NATO database that allows the user to search by subject, area, audience, or delivery method for available E&IT opportunities provided by NATO and Partners.

24. Within this document, COEs are considered NATO accredited COEs.

COLLECTIVE TRAINING AND EXERCISES (CT&E)

25. The focus of NATO's CT&E programme is to ensure that the Alliance has a coherent set of deployable, interoperable and sustainable forces that are equipped, trained, exercised and commanded so as to meet NATO's LoA. Coupled with the SGE and SACEUR's CT&E Annual Directive, this forms the basis for the generation, through the NATO Exercise Programme Alignment Conferences (NEPAC) and MTEP Planning Boards (MPBs), of the NATO Core Exercise Programme captured in Chapters 1-3 of the MTEP²⁵.

26. The bi-annual NEPAC serves as the venue to synchronize NATO and Allies exercise programmes toward NATO objectives. This will reinforce SACEUR's Strategic Directive on AOR Management and Peacetime Vigilance and harness National programmes to support Alliance Training, Deterrence and Transformational effects achieved through the NATO MTEP.

27. The final output of the collective MTEP Cycle is the publication of the MTEP, detailing collective training activities and military exercises designed to meet requirements over a four year period. The MTEP provides the authority for programming the requisite budget for inclusion in the Medium Term Resource Plan (MTRP), in line with current Resource Policy and Planning Board policy.

28. Additionally, the MPBs and NEPACs serve as a venue for the delivery and coordination of the Clearing House Mechanism²⁶ which seeks to match CT&E 'Demand Signals' with 'Opportunity' for Allies (including PN and NNE²⁷). Although coordination efforts for NATO CT&E are encouraged at all levels, when dealing with Partners and NNEs, the stipulations in Annex A must be applied. NATO's formal commitment to synchronize exercise activity with Allies and Partners manifests in two main ways:

- a. The Alignment of Exercise Programmes.
- b. The coordination of activity through the Deterrence Management cycle. CT&E activities (NATO core exercises, NATO involvement in Partner exercises & national exercises) contribute to the Military Deterrence Posture and are integrated in SACEUR's Blue-Picture.

29. NATO Allies National exercises and those of Partners are reflected in Chapters 4 and 5 of the MTEP. MTEP Chapter 4, Part C is available for use by Allies to inform other Nations, allowing them the opportunity to participate in/or observe their national exercises. The definition and the conduct of these exercises, as well as the participation, remain a national prerogative. For Partners, procedures for MTEP Chapter 5 are covered in Annex A.

30. SHAPE will inform Allies about NATO involvement²⁸ in Allied national exercises, if a Partner or NNE is participating in or observing the exercise. Allies retain the right to request case by case MC approval. If further considered, the Allies retain the right to request NAC approval.

25. See Annex E, Page E-7.

26. See Annex E, Page E-4.

27. Although the primary venue for this activity is the annual Military Strategic Partnership Conference.

28. Involvement in NATO ETEE broadly includes participants, visitors, observers and inspectors. See Annex A, Page A-3 or definitions in Annex E, Page E-7.

31. For any reason, Allies retain the right to request case by case MC endorsement and NAC approval of linking, Exercise Specifications (NATO EXSPECs) or other topics related to exercises.

32. MC endorsement and NAC approval is required to agree the Exercise Concept of major Joint Live Exercises.

COORDINATION AND LINKING²⁹ OF EXERCISES

33. Coordination of ETEE activity between Nations and NATO SCs can exponentially increase opportunities to improve readiness, deterrence and enhance warfighting development. As such, SCs will work with Allies through the use of the Global Programming Approach, and continuously through Allies' military representatives, to achieve alignment of NATO and Allies ETEE activity. Through ETEE alignment, NATO will effectively leverage the combined strength of ETEE activity, as articulated in DDA, toward achieving NMS objectives. One of the common practices conducted as part of efforts to align NATO and Allies ETEE activity is linking between Allies and NATO exercises.

34. Allies are invited to propose the linking of exercises well in advance (at least two years³⁰) to SHAPE during the MTEP cycle (to include the NEPAC). Allies, which are offering their national exercises, are responsible for providing detailed information, especially regarding the nature of the linking, the participation of Partners and NNEs, and planned related exercises. This will ensure that Allies have full visibility of details for determining linking procedures.

35. Linking of Allies and NATO exercises can occur in two ways³¹:

a. SHAPE can proceed with linking and will enter the exercise into the MTEP Chapter 4a or 4b.

b. At the request of Allies or on the determination of SHAPE, exercise linking can be attained with a request to the MC for approval. If this occurs, SHAPE is responsible for developing and processing the link request to the MC. This request must define the type of relationship requested and the implications as well as benefits for NATO. Requests sent to the MC for linking approval should also include comments regarding budgetary and human resource implications.

36. National exercises will be shown in MTEP Chapter 4 in three parts:

a. Chapter 4a. Lists National Exercises linked to NATO with the Nation as the OSE.

b. Chapter 4b. Lists National Exercises linked to NATO with NATO as the OSE.

29. See definition in Annex E, Page E-7.

30. Linking requests should be logical in timing with the exercise planning process and enhance Baseline Activities and Current Operations peacetime efforts.

31. Involvement of Partners and NNEs in NATO ETEE requires approvals specified in Annex A. This includes any effort to link Allies exercises that include Partner and NNEs and Partner/NNE exercises with NATO exercises.

- c. Chapter 4c. National Exercises not linked to NATO.

37. SHAPE will provide a periodic update of SHAPE approved linking requests to the MC through appropriate means.

CANCELLATION OR UNLINKING OF EXERCISES

38. SHAPE has the authority to cancel a NATO exercise. If an exercise that received either MC or NAC approval is cancelled, SHAPE informs the MC stating the reason(s), the nations involved in the cancelled exercise and the way ahead. A summary report of cancelled exercises shall be submitted annually in conjunction with the annual submission of the OTP and NNEs portion of the MTEP.

39. NATO and/or Nations retain the authority to unlink their exercises.

NATO EVALUATION PROGRAMME

40. The purpose of the NATO Evaluation Programme is to provide assurance that all declared forces and/or capabilities are ready and prepared to meet current and contingent operational priorities in accordance with NATO agreed standards. Furthermore, it supports HQs and forces in their preparation for planning and execution of operations. The NATO Evaluation Programme will be tailored and flexible, seek continuous improvement rather than grading pass/fail, and improve dialogue and cooperation.

41. Evaluation approach focuses particularly on the following aspects:

- a. Dialogue and interaction: Key to success is open and proactive cooperation of the evaluated entities with the Evaluation Conducting Authorities. Therefore, the evaluations should be closely coordinated between both parties to ensure mutual support in achieving the desired outcome.

- b. Continuous improvement: Evaluation is not a pass or fail event but facilitates continuous improvement, based on NATO agreed standards, and makes NATO ETEE a genuine learning system.

- c. Tailored and flexible evaluation: Usually, an evaluation takes place during the major phases of the exercise, however all evaluation opportunities inside and outside of an exercise should be exploited.

42. Evaluation of the NCS/NFS is based on defined ACO Forces Standards³² (AFS) for common NATO tasks that establish the baseline for the employment of forces allocated to NATO. CT&E objectives should be defined according to those based on NATO standards. A critical aspect to all NATO evaluation activities is the requirement to capture and incorporate Lessons Identified³³ and to facilitate Remedial Actions³⁴ in order that they become Lessons Learned.

32. See details in Annex B, Reference M.

33. For the definitions of Lessons Identified and Lessons Learned see extant Policy for Lessons Learned.

34. Detail may be found in Annex B, Reference N.

43. A verification process³⁵ is designed to provide SACEUR the assurance that National forces committed to NATO are held at the appropriate level of capabilities and readiness. Nations should facilitate force verification mechanisms as appropriate. No such verification is required where NATO undertakes to train and evaluate allocated HQs or forces.

PART 4: RESPONSIBILITIES

44. NATO will support Allies and Partners in achieving established standards and the transformation of national ETEE systems as required through the provision of complementary E&T, particularly in joint, combined proficiencies that are outside the ability of Nations to deliver.

45. Allies. NATO Nations, including through the MC³⁶ when appropriate, will ensure:

a. That personnel assigned to NATO Peacetime Establishment (PE) and Crisis Establishment (CE) Posts satisfy NATO agreed standards and requirements as detailed in Job Descriptions (JDs)³⁷ prior to arrival.

b. Compliance with all operational and training related agreements found within applicable Memoranda of Understanding (MOU)³⁸, whenever voluntarily assuming the role of a Framework Nation³⁹.

c. Application, at all times, of NATO operational standards in the execution of training and the evaluation of forces and personnel offered.

d. That their units meet the required NATO agreed standards in accordance with their declared Readiness Category (RC).

e. Through the MC Standardization Boards, that subordinate working groups address exercise observations and lessons in the reviews of the doctrines and standards to which those inputs apply.

46. In order to improve interoperability and efficiency, NATO Nations are encouraged to synchronize their ETEE planning activities with the NATO E&T PPP, and open their education and training facilities (ETFs) for other NATO Nations, Partners and NNEs, to the extent practicable and feasible in relation to national constraints. The approval authorities for ETEE activities are described in Annex D.

47. Responsibilities of NATO Strategic Commands (SCs). The integration of NATO ETEE efforts between the two SCs is essential to the success of the NATO ETEE programme. As such, all tasks given to one SC are to be coordinated between SCs in order to achieve the synchronization of effort required. Where one SC is in the lead for any particular ETEE effort,

35. See Annex B, Reference O.

36. See Annex B, Reference P, Paragraphs 4 and 8, for detailed MC responsibilities.

37. Nations cannot fulfil this responsibility until after: (1) ACO defines its CE requirements for crisis; and (2) ACO in coordination with ACT and non-NCS entities implement the CE resourcing process.

38. MOUs should be updated to reflect most recent NATO agreed standards and policies on operational and training related topics, as appropriate.

39. See Annex B, Reference Q.

the other will be in a supporting role (Figure 4). For requirements, CT&E and Evaluations, SACEUR is the lead with SACT in support, while SACT leads E&IT with SACEUR in support. SHAPE and HQ SACT manage the NATO ETEE process, complying with the policy agreed by NATO, through subordinate commands and their supporting education and training activities following Bi-SC directives.

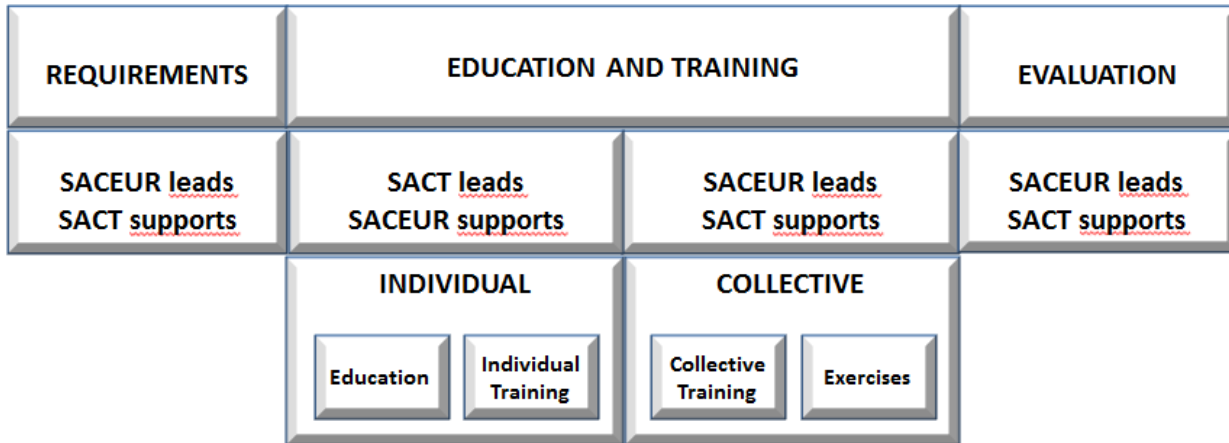


Figure 4. Lead and supporting roles for SCs within the ETEE Spectrum

48. SHAPE.

- a. Identify the operational requirements for current and future operations and report performance deficiencies in existing capabilities.
- b. Develop NATO policy recommendations on the planning, execution and assessment of NATO CT&E.
- c. Develop and maintain AFS while incorporating applicable NATO agreed standards into them.
- d. Develop SGE based on political-military guidance, prioritized training requirements and force capability development needs.
- e. Develop and coordinate a CT&E annual directive.
- f. Coordinate CT&E to fully align Operations, Missions, Activities and StratCom with Defence and Deterrence Objectives and Strategic Effects.
- g. Align Peacetime Establishment and Crisis Establishment posts with the same Education and Individual proficiencies/skills, as detailed in Job Descriptions in order to minimize E&IT requirements (and associated costs).
- h. Manage the production planning process of NATO CT&E through the MTEP and MTEP Report, underlining any exercise with strategic impact in terms of Deterrence, and publish through the electronic Military Training and Exercise Programme (eMTEP).

- i. Plan and execute NATO exercises with the exception of some ACT-led exercises⁴⁰ and exercise scenario development.
- j. Coordinate the planning and execution of evaluations with NATO Nations and NCS/NFS subordinate HQs and provide strategic direction and priorities for the evaluation of contributing forces and HQs; as well as perform evaluations and report on NATO Evaluations through the SACEUR Annual Evaluation Report (SAER).
- k. Execute the Clearing House Mechanism.
- l. Incorporate the process of linking exercises found in this document into the execution of the MTEP, the MTEP Open to Partners and non-NATO-Entities (OTP & NNE) and the Clearing House Mechanism processes, as required.
- m. With the required level of approval, assist in the planning, execution of CT&E, including capability evaluation as appropriate, for Partners and NNEs⁴¹.
- n. Convey ACO's interoperability priorities to guide the development and maintenance of NATO standards.
- o. Ensure relevant NATO agreed standards are used in ETEE guidance and activities, to capture exercise observations and lessons on applicable NATO agreed standards, to support the review process.

49. HQ SACT.

- a. Manage NATO's overarching Global Programming Approach to Training.
- b. Develop NATO policy recommendations on the planning, execution and assessment of NATO E&IT.
- c. Manage the governance structure for each NATO discipline.
- d. Coordinate training activities with Nations, during the annual training Individual Conference including tasking, initiation, administration and support.
- e. Manage the production planning process of NATO E&IT through the ITEP and maintain a web based platform (e-ITEP) that allows all ETFs to announce their courses in a subsystem known as the ETOC.
- f. Manage the E&IT Quality Assurance process including institutional accreditation and certification of courses.
- g. Plan and execute ACT-Led exercises.

40. For example, currently Coalition Warrior Interoperability, eXploration, eXperimentation, eXamination Exercise (CWIX) is an exception.

41. In line with Annex A.

- h. Establish and execute an exercise scenario development process and the coordination of a long term Scenario Development Plan that delivers scenarios for NATO major exercises. Within the specific scenarios, considerations will be explicitly included in case Partners or NNEs are participating or observing⁴².
- i. Coordinate Education and Training events and activities of NETFs, NATO accredited COEs and recognized PTECs ensuring that the activities of their E&T facilities are in compliance with their mandates, their MC/NAC approved concepts and policies and within their respective area of expertise; with the exception of the NATO Defense College (NDC).
- j. Provide support for the development and maintenance of Allied Joint Operational doctrine and other NATO agreed related standards.
- k. Execute NATO accreditation and periodic assessment of COEs, and coordinate with COEs to support effective and efficient solutions to NATO training requirements.
- l. Coordinate integration of wargames and experimentation in NATO ETEE activities.
- m. Establish contact with national education and training facilities through appropriate National authorities as complementary training assets, in order to build awareness of what national facilities may be available to NATO, subject to national approval.

50. Responsibilities of Commanders/Commandants/Directors of NETFs, NATO COEs and PTECs⁴³. Commandants, Commanders and Directors of NETFs, NATO COEs and NATO recognized PTECs are responsible for ensuring that the activities of their E&T facilities are in compliance with their mandates, their MC/NAC approved concepts and policies and within their respective area of excellence. In order to prevent misinterpretations, NATO ETEE activities conducted by Allied and partners' education and training facilities should be clearly distinguished from their national activities and mentioned explicitly in all their documentations and programmes of work.

51. NATO Defense College⁴⁴. The NDC contributes to the effectiveness and cohesion of the Alliance primarily through senior-level education on transatlantic security issues, enabled by research on matters relevant to the Alliance, and supported by engagement⁴⁵ with Allies, Partners and NNE with a 360 degrees approach⁴⁶.

52. All other NATO entities must sustain and maintain NATO ETEE activities and events within their respective responsibilities and directives.

42. In line with Annex A.

43. For more information on NETFs, NATO COEs and PTECs see Annex C.

44. NATO Defense College is a unique NATO institution because it has significant educational impact on the Alliance and is the only NETF that is guided by the Military Committee.

45. In this context, engagement implies the establishment of new relations and development or consolidation of the existing ones.

46. See Annex B, Reference R.

PART 5: COORDINATION REQUISITES

53. Current operations have the highest priority with regard to support from NATO's ETEE resources, followed by support for future operations through training for operational headquarters and NATO Deployable Forces (NDF).

ETEE IN SUPPORT OF CURRENT OPERATIONS

54. Current Operations. While NATO is responsible for providing mission specific training to the NCS, Nations have the responsibility for educating and training all personnel and units for deployment to current operations; this shall not jeopardize responsibilities for defending their own territories. As a supplement to national individual pre-deployment training, NATO may offer opportunities for NATO-led individual augmentee training. The responsible operational command will develop an appropriate individual augmentee training programme. If offered, NATO-led individual augmentee training will usually be considered as mandatory training for specific posts designated by the operational commander. This requirement shall be reflected in the CE/PE JD.

55. New methods such as e-learning, distance learning, virtual learning shall be used as an innovative and cost effective method of teaching and delivering relevant and quality education and training. Nations are encouraged to take advantage of relevant pre-deployment courses provided online, and other computer based media.

56. Key Leader Training (KLT) develops and enhances the senior leadership team for current operations. Key leaders are required to lead, manage and operate in a multi-national environment. Pre-deployment KLT shall be a requirement for designated posts as reflected in the CE/PE JD.

57. A Mission Rehearsal Exercise (MRE) may be organized as the culminating collective training event to ensure a HQ staff possesses the necessary understanding of mission related doctrine, plans, systems and Tactics, Techniques and Procedures (TTPs) specific to their individual and collective functions. If the headquarters is structured as a composite headquarters, this type of training is essential if the requisite level of staff integration is to be achieved prior to deployment.

58. In cases where personnel arriving in theatre require critical training to address emerging threats, the operational commander may develop in-theatre specialized training opportunities.

59. In instances where operational commanders identify training requirements, ACO shall coordinate or offer out-of-theatre training.

60. NATO may be required to train and develop host Nation or local forces as appropriate and subject to NAC Approval⁴⁷. In such circumstances, ACT, in close coordination with ACO for the operational requirements, shall develop individual training opportunities for personnel deploying in a capacity to support the training of those forces. If such a training opportunity exists, Alliance personnel are encouraged to attend NATO-led training prior to deployment to ensure standardization and unity of effort.

47. See Annex B, Reference S.

ETEE IN SUPPORT OF FUTURE OPERATIONS

61. NCS/NFS Augmentee Training and JTF HQ Training. Responsibility for ensuring that augmentees to the JTF HQ meet AFS standards is the responsibility of the Nations and HQs providing augmentees. JTF HQs shall undergo a period of training and evaluation, culminating with certification in accordance with AFS prior to being placed on standby. ACO is responsible for evaluation in order to support certification of the NCS and NFS HQs.

62. JTF HQ training shall focus on the integration of augmentees as well as establishing procedures with subordinate command and force elements. Training of the complete C2 architecture at the JFC and component command levels shall be completed prior to the conduct of a Joint Command Post Exercise (CPX). This joint exercise will ensure that all elements of the Joint Force are combat ready, and fully prepared to begin their standby period.

63. NATO Deployable Forces (NDF)⁴⁸. NDF are NATO's military instruments to assure, deter and address contingencies that might arise. NATO's primary capability in response to emerging crisis across the full range of military operations is the NATO Response Forces (NRF). In order for National Forces to be designated as a NRF, forces⁴⁹ shall undergo a period of training and combat readiness certification prior to being placed on standby. Unit level training is a national responsibility and forms the first essential building block for NRF preparation. The NRF training cycle starts with a National Preparation Phase that is not shorter than six months. National forces are certified in accordance with AFS by their national military authorities. NRF certification is a commander-to-commander process. When commanders are satisfied with the training and readiness level of their unit, HQs, or force package, they shall certify that their force meets AFS to the commander of the higher HQ in the NRF chain of command. At the conclusion of the National Preparation Phase, forces enter the six month Component Command Preparation Phase, during which, the preparation, integration and interoperability of the C2 network under a single common headquarters must be confirmed by a CPX or Live Exercise (LIVEX) if force generation allows. SACEUR has the authority to validate certification. At the conclusion of the NRF Preparation Phase, the NRF enters the 12 months Standby Phase, during which readiness levels are a commanders responsibility and shall be maintained through rehearsal exercises and training in accordance with AFS.

64. Existing NATO, Allied and Partner (NRF contributors) national exercises and training events shall be used to the maximum extent possible as venues for training and certifying forces. Additional events may be requested at the discretion of ACO.

HIGH LEVEL EXERCISE PROGRAMME AT NATO HQ

65. The High Level Exercise Programme (HLEP) is not part of NATO ETEE. Since NMAs are regularly involved in the HLEP, there is a need to harmonize NATO ETEE activities and HLEP activities.

66. The NATO HLEP includes upcoming CMX, Short Notice Exercises (SNEX) and Scenario-Based Discussion (SBD) or Table Top Exercises (TTX) intended to enable Allied

48. See Annex B, Reference L.

49. This planned allocation of forces is identified in annual LTCP.

political and military leadership to take informed, timely and effective decision. The HLEP is planned at the NATO HQ through the Council Operations and Exercises Committee (COEC) and supported by the NATO Military Authorities (NMAs). The integration of NMAs into the planning and exercising of the HLEP is critical to maintaining NATO HQ proficiencies in crisis management. HLEP events will be embedded in the MTEP in order to facilitate the scheduling of NMAs' support and involvement of the IMS and SCs.

RESOURCES AND FUNDING

67. Resources needed to support ETEE achievements could be provided through a range of sources (national, multinational and NATO common funding), which will be subject to further assessment and refinement in accordance with agreed NATO processes. Eligibility for NATO common funding of NATO ETEE activities and Subject Matter Experts (SME) support is decided by the Resource Policy and Planning Board, based on MC recommendation. All ETEE will be conducted in the most efficient manner possible and in accordance with the ETEE Overarching policy for NATO Common Funding⁵⁰.

68. All NATO common funding requirements, as validated by the MC, are provided through the individual training plan and exercise development processes. Accordingly, the published individual training and exercise plans provide the authority to develop the associated budgets: ACO for CT&E and ACT for E&IT and exercise support.

STRATEGIC COMMUNICATIONS

69. StratCom is the integration of communication capabilities and information staff functions with other military activities in order to understand and shape the Information Environment (IE) in support of NATO aims and objectives. StratCom can be achieved through NATO ETEE as well as Nations national ETEE activities. High Profile Exercises⁵¹ (HPE), Major Joint Exercises and the myriad of National exercises provide an opportunity for NATO to incorporate StratCom and achieve NATO Strategic Objectives. StratCom should be integrated into exercise planning from the initial stages and through execution for the training value of developing, coordinating and executing the StratCom messaging output⁵². StratCom must be included within the MTEP development process and synchronized⁵³. The real world impact of training activities should not be overlooked and exercise planners should ensure their events are properly exploited in order to contribute to the wider understanding of, and support for, NATO and its objectives.

TRANSPARENCY MEASURES

70. Visitors. Distinguished Visitors Days, Visitors programmes and/or exercise related ceremonies will be public-oriented. Invitations to Distinguished Visitors Days, Visitors programmes and/or exercise related ceremonies must reflect stakeholders from NATO Command Structure, Troop Contributing Nations, Host Nation and participating Partners and NNEs. Appropriate consideration will be given to allowing visitors controlled access to sensitive aspects of exercises and limited interaction with the conduct of the exercises.

50. See Annex B, Reference T.

51. See Annex E, Page E-6.

52. See Annex B, Reference U.

53. See Annex B, Reference V.

71. Observers/Inspectors. In accordance with specific treaty obligations⁵⁴, observers or inspectors may observe/inspect various stages of NATO exercises. Observation or inspection activities based on treaty obligations do not require MC endorsement or NAC approval. Additionally, SHAPE and HQ SACT will facilitate these obligations as required. When present, observers/inspectors are under the responsibility of the Host Nation⁵⁵.

72. When directed by the NAC, SHAPE and HQ SACT will facilitate and implement any additional transparency measures associated to a specific exercise.

SUBJECT MATTER EXPERTS (SME)

73. SMEs can augment NATO ETEE activities. SMEs from Allies can be from outside the NCS and provide specialist knowledge and assistance where this is not readily available from within NCS. Involvement of SME from Partners and NNEs must be approved by the MC, and Nations are entitled to call for MC endorsement and NAC approval.

LEGAL CONSIDERATIONS

74. To ensure that legal matters are addressed prior to conducting ETEE activities, legal advice should be sought at the earliest possible stage in the planning process. Any NATO ETEE related legal matter that cannot be resolved by SCs could very well be important to political and military authorities and should therefore be addressed via the chain of command, to the IMS, for appropriate level staffing as soon as possible.

75. As the complexity of current operations continues to increase, legal advisors should also be included in the planning and conduct of E&IT activities such as pre-deployment, battle staff and other refresher or sustainment training. Examples of this training should include, but are not limited to: the legal basis for operations; compliance with international law; and the interface between national legal requirements and those arising from a multinational context.

EXPERIMENTATION AND INNOVATION

76. In order to deliver a 'transformational effect' through the ETEE activities programme, Concept Development and Experimentation and Innovation outputs need to be properly integrated and coordinated with the ETEE processes in the most appropriate and effective manner. Harnessing technology, Modelling and Simulation, is an increasingly important aspect of ETEE if the Alliance is to replicate the complex, multi-domain environment within which it will operate, and do so at scale.

77. Leveraging Technology. NATO must leverage the pace of technology advances in the area of training. NATO will leverage the potential of advanced technology within ETEE by continually pursuing new ideas and concepts and exploiting them whenever possible. This effort seeks to enable the accomplishment of the ETEE while realizing cost efficiencies. NATO ETEE will progress technology through the support of experimentation, assessing operational needs for technological requirements, and embracing commensurate changes in technology that improve operational readiness and reduce costs in order to foster a training

54. For example, see Vienna Document 2011 On Confidence and Security Building Measures.

55. Annex B, Reference W contains more direction on the consideration of treaty obligations, restraints and constraints through the Exercise Planning Process (EPP).

culture that adapts to and employs technology in order to challenge individuals and NATO forces. ACO and ACT, with ACT in lead, will investigate and recommend enhancements and innovations to the current training capability of NATO. Accordingly, when necessary, the SCs will update SC Directives that address the benefits and limitations of Emerging Disruptive Technologies (EDTs), including to build appropriate levels of trust to Autonomous Systems (AS). Due to the emerging nature of the technologies, the MC will direct updates to the ETEE Policy, as required. National capabilities and initiatives will be leveraged while maintaining a minimum footprint of common funded capabilities.

78. Concept Development and Experimentation (CD&E). Continuous transformation keeps NATO relevant. The primary purpose of CD&E is to facilitate recognition of capability shortfalls and provide credible solutions.⁵⁶ NATO ETEE is a critical vehicle for execution of the CD&E efforts within NATO and will continue to fulfil this function. Specifically, exercises provide a venue for experimentation that leads to transformation. Where possible, NATO will converge experimentation efforts between Nations and NATO.

SCENARIO DEVELOPMENT

79. Scenario Development. The exercise scenarios should meet the demands of the strategic environment, aligned to DDA and, where applicable, to exercise collective defence plans. NATO uses the terms setting and scenario. A 'setting' is the geographical regional context being used in an exercise. It includes basic geo-data information and political, military, economic, social information and infrastructure (PMESII) data for all regional actors. The 'scenario' is specific to each event and responsive to the objectives of the exercise commanders. It contains additional geo-data and PMESII information, varying in detail as required by the exercise. In NATO exercises, Allies are depicted on the basis of real capabilities and intelligence, whereas the adversary's geography, intent and capabilities are variously real, real but modified or completely fictitious, depending upon the different type of exercise. If an Ally perceives a scenario as politically sensitive, it retains the right to request the scenario to be assessed and agreed by the MC⁵⁷. ACT will execute the scenario development process⁵⁸ for NATO Major Joint Exercises.

80. During the planning and execution phases of NATO Collective Training and Exercises; member Nations' sovereignty rights, political sensitivities and values (such as historical, social, cultural etc.) will be taken into consideration and preventive measures will be defined by Strategic Commands in relevant EXSPECs to avoid any misunderstanding and undesirable incidents in this regard.

56. See Annex B, Reference X.

57. See Annex B, Reference Y.

58. Annex B, Reference W describes the full process.

COOPERATION OF PARTNERS AND NNEs WITH NATO IN ETEE ACTIVITIES

1. Aim. This Annex provides Partners¹ and NNEs² with the information necessary for involvement³ with NATO in ETEE activities, as described in Paragraph 5 of this Policy. Partners' engagement with NATO in ETEE is important for all three core tasks, and to improve interoperability, standards, and capabilities.
2. Overview. Partner and NNEs, are encouraged to request involvement in NATO ETEE activities. In accordance with NATO's Policy for a More Efficient and Flexible Partnership⁴ and Comprehensive Approach Action Plan⁵, the NATO ETEE Policy identifies procedures for Partners and NNEs to play a significant role in the development and implementation of cooperative activities, which encourage coordination and interoperability with NATO. These activities include education opportunities, individual and collective training events and require various coordination and approval procedures. Involvement in NATO ETEE implies that all the stakeholders will act in accordance with the ETEE principles and adhere to the NATO code of conduct⁶ in planning and execution of NATO ETEE.
 - a. NATO cooperation with Partners in ETEE activities will be guided by the agreed partnership programmes⁷ or packages agreed under the Defence and related Security Capacity Building Initiative. These documents contain NATO's Partner-specific cooperation objectives and priorities⁸, and serve as the basis for Partner cooperation with NATO in ETEE activities, with respect to resources and capacity available.
 - b. Partners and NNEs could opt for involvement in NATO activities or request NATO assistance in developing, conducting and assessing its own events. On the same basis, NATO could request⁹ a Partner/NNE to cooperate on ETEE events to achieve desired common or complementary objectives.
3. Partners and NNEs involvement in NATO E&IT¹⁰. E&IT provides foundational opportunities to realize NATO's desire to foster military cooperation with Partners and NNEs.
 - a. Involvement of Partners and NNEs in NATO E&IT should be considered in a timely manner in order to enable proper planning and approval. This involvement

1. Refer to definition in Annex E, Page E-8.

2. Refer to definition in Annex E, Page E-7.

3. Definition in Annex E, Page E-6.

4. See Annex B, Reference Z.

5. All in accordance with the Comprehensive Approach Action Plan (C-M(2008)0029-COR1 and PO(2011)0045) – Updated List of Tasks for the Implementation of the Comprehensive Approach Action Plan), PO(2021)0325 and relevant decisions, including those taken at the Lisbon, Wales, Warsaw and Brussels Summits.

6. See Annex B, References G, H and I.

7. Such as the Individual Partnership Cooperation Programme (IPCP), Individual Partnership Action Plan (IPAP) and the Annual National Programme (ANP) or the Individually Tailored Partnership Programmes (ITPP).

8. Interoperability objectives and goals will be further translated into prioritized military objectives through the MC D&G documents. Implementation of the objectives and goals outlined in individual Partnership documents require access to NATO processes such as MTEP.

9. In accordance with the processes described in this Annex.

10. Such as courses, seminars, workshops, visits, conferences, etc. where attendance is viewed as individual participation.

should be managed in accordance with the Seats Allocation Process¹¹, when applicable.

b. Also, it must be taken into account that the objectives of E&IT for NATO forces and individuals must not be affected by Partners or NNEs as participants, observers or SMEs.

c. Partners and NNEs are responsible for the training and education of their personnel that are allocated to NATO led missions, activities and operations, NRF and NATO exercises. Partners and NNEs will ensure that personnel assigned to NATO Partnership Staff Posts (PSP)¹², Crisis Establishment (CE) Posts, or as part of a Voluntary National Contribution (VNC) comply with NATO training standards and requirements as described in JDs. In order to improve interoperability and efficiency, Partners and NNEs are encouraged to synchronize their ETEE planning activities with the NATO Production Planning Processes (PPP).

d. NATO E&IT activities offered to Partners for participation are managed through the Partnership Cooperation Menu (PCM), which covers relevant parts of the ITEP and is supported by the Partnership Real-time Information, Management and Exchange (ePRIME) system. All Partner eligible E&IT courses are published in the NATO ETOC¹³, embedded in the e-ITEP. The review and approval of the PCM, as well as Partners' participation in the PCM, is conducted in accordance with the established procedure¹⁴.

e. NCS, NFS, NETFs, accredited COEs and recognized PTECs Staffs assigned to contribute to the PCM as Proposing Bodies ensure the proper and timely administration of information in ePRIME, necessary for the involvement of Partners in NATO E&IT activities, guaranteeing the most appropriate information required for final decision. Afterwards, Partners should provide feedback on their involvement in NATO E&IT activities. The Action Authorities will then provide timely and comprehensive feedback through ePRIME system.

f. Involvement of NNEs in NATO E&IT activities is subject to case-by-case MC endorsement and NAC approval.

4. Partners and NNEs involvement in NATO CT&E. In line with the NMS, involvement of Partners and NNEs in NATO CT&E activities is considered an opportunity to be exploited. In integrating Partners and NNEs into NATO CT&E, Allies will be consulted in line with direction and guidance provided by this policy, as follows:

a. The MTEP serves as the vehicle to provide appropriate information on Partners and NNEs involvement in NATO CT&E.

11. In accordance with SHAPE Partnership Directorate Management Guidance.

12. See Annex B, Reference AA.

13. ETOC is a NATO database that allows the user to search by subject, area, audience, or delivery method for available E&IT opportunities provided by NATO and Partners.

14. See Annex B, References BB and CC.

NATO UNCLASSIFIED

- b. MC endorsement and NAC approval for the list of NATO exercises to be open to Partners and NNEs is required and summarized through the annual submission of the “OTP and NNE” portion of the MTEP, using the same time span as Allies.
- c. The involvement of Partners or NNEs in NATO exercises that are not covered by the MTEP OTP and NNE requires case-by-case request through the appropriate chain of command and up to the International Military Staff (IMS) where it will be processed for MC endorsement and NAC approval.
- d. Whether through the MTEP, or on a case-by-case basis, when submitting for approval of Partner or NNE involvement in NATO CT&E, the submission will include an assessment of suitability and impact, especially regarding NATO CT&E objectives. SHAPE ensures timely provision of background information about the exercise, such as the specific nature of involvement of Partners or NNEs, and in which elements of the exercise Partners or NNEs requesting to be involved.
- e. NAC approval applicable to a specific Partner or NNE involvement does not presume approval of a different modality of involvement or additional Partners or NNEs.
- f. The approval process and mitigation measures for the involvement of Partners and NNEs in CT&E does not apply to Partner involvement in national exercises included under Chapter 4, Part C of MTEP.
- g. Partner and NNE involvement in some exercises may have political, operational and legal implications. Therefore Partners and NNEs participating in exercises that meet the following criteria require explicit MC endorsement and NAC approval, in addition to the MTEP OTP and NNE approval.

- (1) Article 5¹⁵.
- (2) Cyber specific exercises¹⁶, including exercises on cyber operations.
- (3) Interoperability-Exploration-Experimentation-Examination exercises¹⁷, except the Federated Mission Networking (FMN) affiliates involvement in the FMN portion of the exercise¹⁸.
- (4) Live Exercise (LIVEXs), if Partners do not meet eligibility criteria listed in Paragraph 4I.

15. Article 5 Exercises are exercises that meet one of the following criteria: (1) Article 5 declaration is injected during the exercise; (2) The declaration of Article 5 is written into the exercise script. Military exercises do not involve Article 5 consultation.

16. With the exception of Partners conforming to Reference DD, Enclosure H, Paragraph 3 / Footnote 1 (the 7-Non NATO Nations). Provisions of Paragraph 4o will still apply.

17. In particular but not limited to Coalition Warrior Exercise (CWIX).

18. FMN affiliates will require MC endorsement and NAC approval for involvement in other portion of the exercise outside the FMN domain. However, FMN affiliates can be involved in all planning activities without specific approvals.

h. New domain exercises¹⁹ and exercises with a strategic footprint²⁰ will have to be clearly highlighted in the MTEP OTP-NNE list for Nations consideration.

i. When NATO CT&E serves as a venue for evaluation towards the certification of elements of NCS/NFS, NATO and/or Allied National authorities responsible to organize the event (OSE/OCE/DIREVAL) will ensure that Partners and NNEs approved to be involved in the exercise comply with the following rules:

(1) During the planning phase, the requirements for evaluation and structures will be discussed separately, without any involvement or assistance of the Partners/NNEs representatives.

(2) During the execution phase, Partners/NNEs personnel should not be involved in the evaluation process under any circumstances (applicable to all phases - static and/or dynamic evaluation). There will be no interaction between the Partners/NNEs personnel and NATO evaluation teams or NATO monitors/observers in any of the main capability areas assessments. Partners/NNEs personnel will not receive any information, or documentation about the NATO/Allied headquarters or units being evaluated (including but not limited to evaluation plans, criteria, standards, checklists, reports, readiness status, personnel numbers, organizations, equipment, capabilities, procedures, etc.).

(3) During the assessment phase, Partners and NNEs will not be invited to assist, observe or intervene in any of the action-review activities related to the evaluation part of the exercise.

j. Enhanced Opportunity Partners (EOPs)²¹ are granted full access in all collective training events and exercises open to Partners (except Article 5 and cyber exercises) and associated planning activities, to include the concept and scenario design development phases.

k. Partner involvement in Article 5 exercises should not be assumed; such Partner involvement will be considered on a cases-by-case basis. In any case, the perception that Article 5 is also applicable to Partners and NNEs must be strictly avoided.

l. The Partners eligible for participating in LIVEXs must receive MC approval. In order to be eligible to participate in NATO LIVEXs, Partners must have at least one of the following:

(1) forces participating in NATO-led operations;

(2) forces declared in the Operational Capabilities Concept (OCC) Pool of Forces;

19. Including space domain and further variation of new domains.

20. Including large scale exercises (Major Joint Operations or higher Exercises), IAMD exercises, DPS exercises and future exercises assessed by the SCs of having a strategic footprint.

21. As described in Annex B Reference EE, Chapter 4, Paragraph 21-26.

(3) formal acceptance to the NRF by the NAC (only for the respective NRF training cycle²²).

m. Units with an OCC Level 2 will be able to participate at a LIVEX unless the Exercise Specification dictates otherwise. The lack of the OCC Level 2 certification impedes Partner participation unless a Pre-Exercise Quality Threshold Evaluation (PETE) process is conducted, tailored to the evaluation level achieved in OCC. Prior to Partner participation in NATO LIVEXs, Partner forces must undergo a PETE or have an OCC Level 2 certification.

n. ACO will provide updates to the MC on Partners and/or NNEs participation in, or observation of, events listed in MTEP-OTP and NNEs after the Main Planning Conference (MPC) of each exercise for information.

o. For any reason, Allies retain the right to request a case-by-case review, to include approval as appropriate, of Partner and NNE involvement in NATO collective training events and exercises activities.

5. NATO Involvement in Partners and NNEs training activities and exercises. Partners and NNEs could request NATO support and/or involvement in their collective training activities and exercises (NATO-led, Partner-led, or Co-led exercises)²³ in order to enhance bilateral cooperation, to achieve common training or STRATCOM objectives, or to improve national armed forces interoperability with NATO. The process will depend on whether there is a clear political commitment or authorization contained in the bilateral cooperation documents signed with each Partner/NNE, in Partnership framework documents or if the requirement was specified and agreed in a dedicated commission meeting.

a. In the case of clear political decision, the SCs will designate the NATO body responsible for scheduling the event (OSE), and inform the MC of the Partners/NNEs invited.

(1) In cases of existing exercises, the Partners must have an Allied sponsor acting as OSE for at least one previous iteration of the event.

(2) In the case of a new exercise, SCs should analyse the request and assign it to the appropriate subordinate command, which will designate a NATO military body to further develop the event. In such cases, NATO will always assume the OSE role, while OCE and ODE will be assigned as appropriate, regardless if the training event will be hosted by NATO or Partner training facilities.

b. When a Partner/NNE submits such a request without a previous political approval or guidance, SCs must conduct an assessment based on the following guiding principles:

22. This also includes all planning and preparation events and activities.

23. NATO-led exercises will be considered NATO events and listed accordingly in Chapter 1 of the MTEP, while Partner-led exercises will be listed in Chapter 5.

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(1) If NCS staff participation falls into the realm of staff-to-staff²⁴ cooperation, the decision is left to the discretion of the SCs in the case of military staffs. SCs will inform the MC prior to each iteration of the events.

(2) For NATO involvement in the specified Partner/NNEs exercise, exceeding staff-to-staff cooperation, MC approval is needed.

(3) The Allies retain the right to request NAC approval if there is an explicit sensitivity.

(4) NATO Involvement in Partners/NNEs LIVEXs and Cyber specific Exercises requires explicit MC endorsement and NAC approval.

c. In cases of new exercises, after the first iteration, SHAPE will conduct and submit to the Allies, an appropriate follow-up analysis to ensure a proper review of outcomes, STRATCOM effects and ways ahead for future iterations. The Partner must work with NATO to develop a STRATCOM Framework and assist in promoting NATO values and a positive image of NATO forces within its community.

d. Partners and other NNEs which are inviting NATO to their national exercises are responsible to provide detailed information as far in advance as possible and SHAPE will ensure a timely submission to the MC to finalize the required approval process on time.

6. Evaluation of Partners. NATO's cooperation with any Partner is based on an individually tailored bilateral political document²⁵. This document contains NATO's Partner-specific cooperation objectives and priorities. An MC Direction and Guidance (D&G) document is then produced for each Partner country. The MC D&G, focusing on military aspects only, translates the political objectives or levels of ambition from the NATO-Partner individual programmes into prioritized military objectives to be implemented by the two Strategic Commands, the NATO Defense College and the NATO Standardization Office, in support of practical cooperation.

a. NATO HQ is responsible for implementing the Feedback and Assessment Mechanism²⁶ in order to evaluate Partner's involvement in NATO ETEE activities. As part of this mechanism, ACO, ACT and the NDC assess the achievements of military cooperation objectives for individual Partner countries and incorporate their assessment in their annual reports to the MC.

b. NATO's OCC Evaluation and Feedback (E&F) Programme provides the evaluation programme for Partners' units²⁷. OCC E&F is open to all Partners. Nevertheless, in order to ensure the required force capability, the Alliance may continue to specify appropriate eligibility criteria for Partner participation in certain activities.

24. "Staff-to-staff" refers to NATO staff personnel, not representing tactical unit, attending Partners/NNEs CT&E Activities.

25. See Footnote 7 of this Annex.

26. See Annex B, Reference FF.

27. Outlined in Annex B, References GG and HH.

7. Training for Operations with Partners and other Non-NATO Nations. Involvement of Partners in training for operations requires evaluation of the added benefits and formal acceptance. Partners and other non-NATO Nations that have not nominated forces for a specific NRF rotation may participate in or observe training and CPXs related to specific NRF deployments or rotations by following procedures contained within this policy and obtaining approval by the NAC. The following Partner groups are granted full access to NATO collective training events and exercises (in accordance with Paragraph 4g):

a. Operational Partners that have been formally accepted by the NAC, in accordance with the procedures²⁸, in NATO ETEE activities related to that operation, including all planning and preparation events and activities.

b. Partners and other non-NATO Nations that have been formally accepted to the NRF by the NAC, in accordance with the agreed Framework for Partner Involvement in the NRF²⁹, in the NRF training cycle on an equal basis as other contributing Allies, including all planning and preparation events and activities.

c. In instances where operational commanders identify training requirements for the approved participating Partners, ACO shall coordinate or offer out-of-theatre training. Operational Partners and NRF contributors are encouraged to ensure that personnel, who have attended such training events, are made available both within their national training structure and to NATO in order to develop a lasting capacity to provide that training to other deploying personnel.

d. Enhanced Opportunity Partners in all collective training events and exercises and associated planning activities, to include predesign and scenario design phases³⁰.

8. Allies linking requests identifying Partner/NNEs involvement³¹:

a. If an Ally requests to link a national exercise that contains Partners and NNEs, the request to link will be forwarded to the MC for consideration and approval, unless the Partner or NNE has already been approved for involvement in the requested NATO exercise through other means. In this case SHAPE can proceed with linking and will enter the exercise into the MTEP Chapter 4a or 4b.

b. Allies who submit requests to link³² national exercises, must clearly list all Partners and NNEs that are planned to participate in the national exercise and its planned related exercises.

c. Should the Allies or the MC determine that the request is sensitive in nature, they reserve the right to request NAC review and approval.

9. Linking of NNEs' or Partners' National Exercises with NATO exercises. The process to establish a link between a NATO Exercise and a national exercise is also available for Partners and NNEs, and benefits both sides by using resources efficiently, maximizing the

28. See Annex B, References FF and II.

29. See Annex B, Reference JJ.

30. See Annex B, Reference KK.

31. See definition Annex E, Page E-6.

32. For unlinking see Paragraph 38 of the main body.

training event effects and ultimately enhancing bilateral cooperation and increasing interoperability.

a. NNEs' or Partners' national exercises will be shown in MTEP Chapter 5 in three parts:

(1) Chapter 5A. Lists of NNEs' or Partners' national exercises linked to NATO which retains national authority.

(2) Chapter 5B. Lists of NNEs' or Partners' national exercises linked to NATO under NATO authority.

(3) Chapter 5C. NNEs' or Partners' national exercises not linked to NATO.

b. Based on a Partner/NNE specific linking request with appropriate detailed information addressed to SHAPE, ACO will analyse and decide the validity, feasibility, opportunity, supportability and practical conditions of the respective request.

c. In the case of clear political decision contained in the bilateral cooperation documents signed with each Partner/NNE, in Partnership framework documents or if the requirement was specified and agreed in a dedicated commission meetings, SHAPE will proceed with the linking.

d. If no political guidance exists, approval is retained at NATO HQ, although the authority to coordinate CT&E activity between NCS and Partners/NNEs is encouraged at all levels. MC approval is required for all Partner/NNEs exercises proposed to be linked, with the exception of the categories listed in Paragraph 4g, for which explicit MC endorsement and NAC approval is needed. The responsibility to ensure that proper approvals are acquired prior to the execution, lies with SHAPE.

e. Partners/NNEs offering their exercises are responsible for providing information, regarding the previously invited Partners/NNEs and potential related exercises. Partners/NNEs exercises proposed for link will be submitted for approval (as per Paragraph 9d). Once approved, the exercises will be placed in the MTEP, Chapter 5A or 5B, as applicable. For Partners' non-linked exercises, MTEP Chapter 5C is available to inform/invite NATO, Allies or other Partners/NNEs to participate in, or observe their national exercises.

f. All Partners/NNEs to be invited after confirming the link of the two exercises requires MC notification for further consideration.

g. NATO³³ or Partners/NNEs retain the authority to unlink their exercises.

10. Training for Capacity Building (CB) Support to Partners. In contrast to NATO ETEE, which focus on developing Allies' interoperability and training C2³⁴, CB concentrates on developing Partner forces. Rather than solely relying on one-time training events (which produce immediate individual or formation readiness that may expire in time), CB support

33. The MC or SCs.

34. Command and Control.

assists partners to create and sustain their own capabilities. Consequently, the scope of CB support includes areas such as training management, doctrine generation, legal frameworks, facility requirements and institutional change. CB activities will be based on the ITPPs³⁵, Defence and Security Related Capacity Building Initiative (DCB-I) packages, and other agreed partnership support documents. It will be coordinated through In-country training, Out-of-country training and military and civilian presence (to coordinate, advise and assess)³⁶. The SCs will develop a comprehensive CB capability³⁷, to provide support to both individual and collective training. Exercises such as NATO-Partner exercises (NPEXs) and Regional exercises (REGEXs)³⁸ will be useful CB opportunities to develop tactics and procedures that could improve interoperability in the future, enabling Partners' participation in NATO's exercise programme.

11. Visitors. If the Host Nation in coordination with the Officer Conducting Exercise (OCE) wishes to invite visitors from Partners and NNEs in addition to those already approved by the NAC for participation and observation, SHAPE will inform the MC prior to inviting them³⁹. Allies retain the right to seek MC endorsement and NAC approval prior to the release of formal invitations.

12. NATO financial assistance for Partners' participation in agreed PCM activities⁴⁰ can be provided in line with the Guidelines for the Financing of NATO's Partnership Activities⁴¹, or future updated guidelines.

13. Recognizing the Invitees⁴² status, NATO should provide focused training support to Invitees through developing a comprehensive list of necessary training opportunities (based on the most current ITEP and MTEP) and other training activities, which require MC endorsement and NAC approval, to enhance their forces and operational support capabilities.

35. See Annex B, Reference EE.

36. See Annex B, Reference LL, Annex 1, Paragraph 34.

37. See Annex B, Reference MM.

38. Concepts under development, as per Annex B, Reference MM.

39. The HN, the OCE and SHAPE will include their assessment on the possible impact for the objective of the Exercise, mitigation measures if required, and aspects on information exchange arrangements to be taken into account.

40. Military exercises and pre-deployment training activities are not included (except for those activities related to the planning of NATO exercises). Reference relevant authorising documents such as the PCM and the IPCPs (e.g. planning conferences, seminars, workshops, and post-exercise conferences).

41. See Annex B, Reference NN.

42. See Annex E, Page E-6.

References and Other Sources of Interest

The References below are included for their applicability to this policy. Not all References may be releasable to all users of this MC Policy.

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- B. MC 0700 (Final), Military Committee Policy for the NATO Military Strategic Synchronisation and Linkages Process, 3 Nov 21.
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- D. MCM-0019-2022, The Alliance Warfare Development Agenda (WDA), 7 Apr 22.
- E. MCM-0200-2020, NATO Warfighting Capstone Concept, 28 Jan 21.
- F. MCM-0067-2020, Concept for Deterrence and Defence of the Euro-Atlantic Area, 15 May 20.
- G. C-M(2010)0016, NATO Code of Conduct, 3 Feb 10.
- H. PO(2013)0581, Cyber-Defence Amendments to the Civilian Personnel Regulations and to the Code of Conduct, 27 Nov 13.
- I. PO(2020)0401, NATO Code of Conduct – Amendment, 9 Dec 20.
- J. BI-Strategic Command Directive 075-002, Education and Training (E&T) Directive, 6 Sep 16.
- K. IMSM-0136-2022, SACEUR's Guidance for Education, Training, Exercises and Evaluation, Collective Training and Exercise Directive 24, and E-Repository, 17 Mar 22.
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- M. SH/SDP/SDF/PS/20-005155/2, ACO Manual (AM) 080-002-001, Allied Command Operations Forces Standards Volume I General, 14 Sep 20.
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- O. MCM-0286-2021, The New Force Model, 20 Jan 22.
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- Q. PO(2014)0308, Framework Nations Concept, 14 May 14.
- R. MC 0123/10 (Final), Policy Guidance for the NATO Defense College, 30 Apr 21.
- S. MCM-0034-2014, NATO Security Force Assistance Concept, 28 Mar 14.
- T. PO(2014)0805, Education, Training, Exercises and Evaluation Overarching Policy for NATO Common Funding Report by the Resource Policy and Planning Board, 15 Dec 14.
- U. MC 0628 (Final), NATO Military Policy on Strategic Communications, 26 Jul 17.
- V. ASCP-01, NATO Strategic Communications Training Standards, 2 Jun 20.
- W. BI-Strategic Command Directive 075-003, Collective Training & Exercise Directive, 2 Oct 13.
- X. MC 0583 (Final), MC Policy for NATO Concept Development and Experimentation, 4 Oct 10.
- Y. MCM-0181-2015, Future Development of NATO Exercise Scenarios, 10 Nov 15.
- Z. PO(2011)0124, Policy for a More Efficient and Flexible Partnership, 11 Apr 11.
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- BB. PO(2017)0159 (INV), Modalities for Management of the Partnership Cooperation Menu, 5 Apr 17.
- CC. PO(2017)0242 (INV), Modalities for Management of the Partnership Cooperation Menu and Accompanying Decision Sheet, 24 May 17.
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- EE. PO(2021)0099, Partnership Reform, 19 Mar 21.
- FF. PO(2011)0141, Political Military Framework for Partner Involvement in NATO-Led Operations, 13 Apr 11.
- GG. MC 0554/1 (Final), Military Committee Policy for the Development and the Implementation of the Whole Potential of the Operational Capabilities Concept within a more Operational Partnership, 5 Dec 07.
- HH. MCM-0045-2019 (INV) Second Revision of Operational Capabilities Concept Evaluation and Feedback Programme, 11 Mar 19.
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- JJ. EAPC(C)D(2006)0036, Framework for Partner Involvement in the NATO Response Force, 16 Nov 06.
- KK. PO(2014)0453, Partnership Interoperability Initiative, 30 Jun 14.
- LL. PO(2022)0246, Political-Military Advice on Strengthening Capacity Building Support to Partners, 8 Jun 22.
- MM. IMSM-0283-2022 (INV), Bi-SC Implementation Plan to Strengthen Capacity Building Support to Partners on Existing Commitments (Phase 1), 8 Jul 22.
- NN. C-M(2011)0101, Guidelines for the Financing of NATO's Partnerships Activities, 15 Dec 11.
- OO. MC 0685 (Final) – Final Decision on MC 0685- Military Committee Policy for Centres of Excellence, 8 Sep 20.
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6. PO(2012)0045, Concept for Partnership Training and Education Centres, 1 Feb 12.
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8. C-M(2012)0078, Revised Crisis Management Exercise Policy, 9 Aug 12.
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12. MCM-0120-2011 Revision 1, Direction and Guidance for Military Cooperation with Individual Partners, 6 Feb 15.
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23. MCM-0171-2018, Military Committee Advice on Proposed Reporting Mechanism and Timeframe to Inform the Council of the Progress enabled by the Clearing House Mechanism with Regard to Follow-on-Forces Training, 18 Sep 18.
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27. C-M(2002)60, The Management of Non-Classified NATO Information, 11 Jul 02.
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List of NATO Education and Training Facilities (NETFs), NATO Accredited Centres of Excellence (COEs), Partnership Training and Education Centres (PTECs)

This Annex contains established NETFs, COEs and PTECs. These facilities and centres are vital enablers for fulfilling NATO E&T requirements. The list is a living document and is updated when new facilities and centres are identified and accredited or when they lose their accreditation.

NATO Education and Training Facilities (NETFs)

1. Joint Analysis Lessons Learned Centre (JALLC), Portugal
2. Joint Forces Training Centre (JFTC), Poland
3. Joint Warfare Centre (JWC), Norway
4. NATO Communication and Information Academy (NCI Academy), Portugal
5. NATO Defense College (NDC), Italy
6. NATO Maritime Interdiction Operational Training Centre (NMIOTC), Greece
7. NATO School Oberammergau (NSO), Germany
8. NATO Special Operations School (NSOS), Belgium

NATO Accredited Centres of Excellence (COEs)

1. Analysis and Simulation Centre for Air Operations (CASPOA), France
2. Command and Control COE (C2 COE), Netherlands
3. Civil-Military Cooperation COE (CCOE), Netherlands
4. Cold Weather Operations COE (CWO COE), Norway
5. Combined Joint Operations from the Sea COE (CJOS COE), United States
6. Cooperative Cyber Defence COE (CCD COE), Estonia
7. Counter-Improvised Explosive Devices COE (C-IED COE), Spain
8. Counter-Intelligence COE (CI COE), Poland
9. Crisis Management and Disaster Response COE (CMDR COE), Bulgaria
10. Defence Against Terrorism COE (COE-DAT), Türkiye
11. Energy Security COE (EN-SEC COE), Lithuania
12. Explosive Ordnance Disposal COE (EOD COE), Slovakia
13. Human Intelligence COE (HUMINT COE), Romania
14. Integrated Air and Missile Defense (IAMD COE), Greece
15. Joint Air Power Competence Centre (JAPCC), Germany
16. Joint Chemical Biological Radiological and Nuclear Defence COE (JCBRN COE),
Czechia
17. Maritime Geospatial, Meteorological, and Oceanographic (MGEOMETOC COE),
Portugal
18. Maritime Security COE (MARSEC COE), Türkiye
19. Military Engineering COE (MILENG COE), Germany
20. Military Medicine COE (MILMED COE), Hungary
21. Military Police COE (MP COE), Poland
22. Modelling and Simulation COE (M&S COE), Italy
23. Mountain Warfare COE (MW COE), Slovenia
24. Naval Mine Warfare COE (NMW COE), Belgium
25. Operations in Confined and Shallow Waters COE (CSW COE), Germany
26. Security Forces Assistance (SFA COE), Italy
27. Stability Policing COE (SP COE), Italy

28. Strategic Communications COE (STRATCOM COE), Latvia

Partnership Training and Education Centres (PTECs)

A PTEC is a nationally or multi-nationally sponsored facility, recognized by NATO in accordance with the terms of the PTEC concept. Recognition is subject to NAC approval. Through a privileged and tailored access to NATO operational experts, education, training and exercises, PTECs will coordinate, collaborate, exchange, and provide recognized expertise in order to mutually improve the knowledge and interoperability of Allies and Partners across the full spectrum of operations.

1. Austrian Armed Forces International Centre (AUTINT), Austria
2. Cairo International Centre for Conflict Resolution Peacekeeping and Peacebuilding (CCCCPA), Egypt
3. Chemical, Biological, Radiological and Nuclear (CBRN) Training Centre, Serbia
4. Columbian International Demining Centre (CIDES), Columbia
5. Continuous Training Centre of the Armed Forces Military Academy, Moldova
6. Crisis Management and Multinational Operations Department (CMMOD), Romania
7. Defence Academy, United Kingdom
8. European Personnel Recovery Centre (EPRC), Italy
9. Finnish Defence Forces International Centre (FINCENT), Finland
10. Five Hills Peace Support Operations Training Centre, Mongolia
11. Foreign Languages Department (FLD) National Military University, Bulgaria
12. Geneva Centre for Security Policy (GCSP), Switzerland
13. German Armed Forces United Nations Training Centre (GE UN Trg Ctr), Germany
14. Hellenic Multinational Peace Support Operations Training Centre (Hellenic MPSOTC), Greece
15. Hungarian Defence Forces Peace Support Training Centre (HDF PSTC), Hungary
16. International Institute of Humanitarian Law (IIHL), Italy
17. International Peacekeeping and Security Centre (IPSC), Ukraine
18. Israeli Defence Forces Military Medical Academy (IDF MMA), Israel
19. Joint Special Operations University (JSOU), United States
20. Jordan Armed Forces Language Institute, Jordan
21. Naval Postgraduate School (NPS), United States
22. Partner Language Training Centre Europe (PLTCE), Germany
23. Peacekeeping Training Centre of the Ministry of Defence (KAZCENT), Kazakhstan
24. Peace Operation Training Centre (POTC), Jordan
25. Peace Support Operations Training Centre (PSOTC), Bosnia and Herzegovina
26. Public Affairs Regional Centre (PARC), North Macedonia
27. Regional Department of Defence Resources Management Studies (DRESMARA), Romania
28. Sachkhere Mountain Training School, Georgia
29. Armed Forces Academy of General Milan Rastislav Stefanik, Slovakia
30. Slovenian PfP Language Training Centre, Slovenia
31. Swedish Armed Forces International Centre (SWEDINT), Sweden
32. United States Peacekeeping and Stability Operations Institute (PKSOI), United States
33. Peace Support Operation Training Centre Swiss Armed Forces International Command (PSO TC SWISSINT), Switzerland
34. Turkish Partnership for Peace Training Centre, Türkiye

Approval Authorities for ETEE Activities.

X – Standard Procedure

(X) – Alternate Procedure

ETEE Activity	SCs	MC	NAC	Comment
List of Disciplines		X		ACT submits the list of disciplines for approval NLT 15 November Annually (Reference: Paragraph 15)
Discipline Department Head (DH)	X	(X)	(X)	NAC approval is needed for DHs assigned from Partners or NNEs (Reference: Paragraph 15.b)
Requirements Authority (RA)	X	(X)		ACO will submit for MC approval only those RAs proposed from outside of ACO (Reference: Paragraph 15.a)
Strategic Training Plans		X	(X)	Allies retain the right to request a case-by-case MC endorsement and NAC approval if there is a perception of political sensitivity (Reference: Paragraph 17.b)
Individual Training & Education Programme (ITEP)	X			This document, owned by SACT, is sent for information to the Allies. (Reference: Paragraph 22)
Military Training & Exercise Programme (MTEP)	X			This document, owned by SACEUR, is sent for information to the Allies (Reference: Paragraphs 25-27)
EXSPECs	X		(X)	Reference: Paragraph 31
Exercise Concept of Major Joint Live Exercises			X	Reference: Paragraph 32
Request for linking (between Allies Exercises and NATO Exercises)	X	(X)	(X)	(X) For any reason, Allies retain the right to request case by case MC endorsement and NAC approval of (...) linking. (Reference: Paragraphs 31, 33-38)
Treaty obligation Inspectors / Observers				Inform MC (Reference: Paragraphs 70-72)

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ETEE Activity	SCs	MC	NAC	Comment
NATO involvement in Allies exercises, in case a Partner or NNE is participating or observing	X	(X)	(X)	Reference: Paragraph 30.
NNE SMEs Involvement		X		NAC approval upon Nations request (Reference: Paragraph 72)
NNE involvement in NATO E&IT			X	Reference: Annex A, Paragraph 3.
Partner involvement in NATO E&IT	X			Reference: Annex A, Paragraph 3.
NNE/Partner involvement in NATO CT&E	X	(X)	(X)	Reference: Annex A, Paragraph 4.
MTEP Open to Partners and NNEs			X	Reference: Annex A, Paragraph 4.
Partners/NNEs exercises proposed for linking to a NATO Exercise	(X)	X	(X)	Unless a clear political decision exists and with the exceptions listed in Paragraph 9 of Annex A.
NATO involvement in Partners/NNEs Exercises	X	X		SC = staff to staff. MC > staff to staff Reference: Annex A, Paragraph 5.
Accreditation of the NATO Centres of Excellence (COEs)			X	Reference: Annex B, Reference OO.
Recognition of the Partnership training and Education Centres (PTECs)			X	Reference: Annex C, page C-2.

ETEE Lexicon/Glossary**ETEE Lexicon**

ACO	Allied Command Operations
ACOS	Assistant Chief of Staff
ACT	Allied Command Transformation
ADC	Annual Discipline Conference
AFS	ACO Forces Standards
AOR	Area of Responsibility
C2	Command and Control
CA	Comprehensive Approach
CB	Capacity Building
CD&E	Concept Development and Experimentation
CE	Crisis Establishment
CMX	Crisis Management Exercise (NATO)
COE	Centre of Excellence
COEC	Council Operations and Exercises Committee
CPX	Command Post Exercise
CRO	Crisis Response Operation
CS	Cooperative Security
CT&E	Collective Training and Exercises
DAP	Discipline Alignment Plan
DCB-I	Defence and Security Related Capacity Building Initiative
DDA	Concept for Deterrence and Defence of the Euro-Atlantic Area
D&G	Direction and Guidance
DH	Department Head
E&F	Evaluation and Feedback
E&IT	Education and Individual Training
EOP	Enhanced Opportunity Partners
ePRIME	Partnership Real-Time Information Management and Exchange System
E&T	Education and Training
ETEE	Education, Training, Exercises, and Evaluation
ETF	Education and Training Facilities
ETOC	Education and Training Opportunity Catalogue
EXSPEC	Exercise Specifications
FMN	Federated Mission Networking
GP	Global Programming
HLEP	High Level Exercise Programme
HN	Host Nation
HPE	High Profile Exercise
HQ SACT	Headquarters Supreme Allied Commander Transformation
ICI	Istanbul Cooperation Initiative
IE	Information Environment
IO	International Organisation
IPAP	Individual Partnership Action Plan
IPB	ITEP Planning Board
IPCP	Individual Partnership Cooperation Programme

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ITEP (eITEP)	Individual Training and Education Programme (Electronic ITEP)
JALLC	Joint Analysis and Lessons Learned Centre
JD	Job Description
JFC	Joint Force Command
JFD	Joint Force Development
JFTC	Joint Forces Training Centre
JTF HQ	Joint Task Force Headquarters
JWC	Joint Warfare Centre
KLT	Key Leader Training
LIVEX	Live Exercise
LoA	Level of Ambition
LTCP	Long Term Commitments Plan
MC	Military Committee
MD	Mediterranean Dialogue
MloP	Military Instrument of Power
MJO	Major Joint Operation
MNTI	Multinational Training Institutions
MOU	Memorandum of Understanding
MPB	MTEP Working Group Programming Board
MRE	Mission Rehearsal Exercise
MSO	Military Strategic Objective
MTEP (eMTEP)	Military Training and Exercise Programme (Electronic MTEP)
MTRP	Medium Term Resource Plan
MTS	Mobile Training Solutions
NAC	North Atlantic Council
NCS	NATO Command Structure
NDC	NATO Defense College
NDF	NATO Deployable Forces
NETF	NATO Education and Training Facility
NETR	NATO ETEE Requirements
NEPAC	NATO Exercise Programme Alignment Conference
NFS	NATO Force Structure
NGO	Non-Governmental Organisation
NITEC	NATO Individual Training and Education Conference
NMA	NATO Military Authority ⁶
NMIOTC	NATO Maritime Interdiction Operational Training Centre
NMS	NATO Military Strategy
NNE	Non-NATO Entities
NPEX	NATO-Partner Exercises
NRF	NATO Response Force
NSO	NATO School Oberammergau
NTG	NATO Training Group
NTI	National Educating and Training Institutions
NWCC	NATO Warfighting Capstone Concept
OCC	Operational Capabilities Concept
OCC E&F	Operational Capabilities Concept Evaluation and Feedback
OCE	Officer Conducting the Exercise
ODE	Officer Directing the Exercise
OSE	Officer Scheduling the Exercise
OTP	Open to Partners

NATO UNCLASSIFIED

PAP	Partner Action Plan
PARP	PfP Planning and Review Process
PatG	Partners across the Globe
PCM	Partnership Cooperation Menu
PE	Peacetime Establishment
PETE	Pre-Exercise Quality Threshold Evaluation
PfP	Partnership for Peace
PG	Political Guidance
PMESII	Political, Military, Economic, Social Information and Infrastructure
POC	Point of Contact
PPP	Production Planning Process
PSP	Partnership Staff Posts
PTEC	Partnership Training and Education Centre
RA	Requirements Authority
RC	Readiness Category
REGEX	Regional Exercises
SACEUR	Supreme Allied Commander Europe
SACT	Supreme Allied Commander Transformation
SAER	SACEUR's Annual Evaluation Report
SBD	Scenario-Based Discussion
SGE	SACEUR's Guidance on ETEE
SC	Strategic Commands
SHAPE	Supreme Headquarters Allied Powers Europe
SME	Subject Matter Experts
SNEX	Short Notice Exercises
SOP	Standard Operating Procedure
STANAG	NATO Standardization Agreement
STP	Strategic Training Plan
STRATCOM	Strategic Communications
TA	Training Audience
TNA	Training Needs Analysis
TRA	Training Requirements Analysis
TRI	Training Requirements Identification
TTP	Tactics, Techniques and Procedures
TTX	Table Top Exercises
VNC	Voluntary National Contribution

ETEE Glossary

(The following definitions apply to NATO ETEE).

Annual Discipline Conference (ADC) – This conference is a recurring event that involves a review of the NATO E&IT requirements related to a discipline and verifies the adequacy of the discipline – specific E&IT programme to satisfy the requirements. The intent is to ensure E&IT remains aligned with evolving needs and to determine the way ahead in closing gaps while further developing the discipline. This conference contributes to the development of the Discipline Alignment Plan.

Certification – The process of officially recognizing that organisations, individuals, material or systems meet defined standards or criteria (definition found on NATO Terms).

Clearing House Mechanism - The “Clearing House“ process merely provides a forum and advocacy mechanism to facilitate greater visibility of perceived training and exercise shortfalls, and an enduring means to ‘broker’ identified ‘user’ requirements with potential solution ‘providers’. At any time outside of the deliberate process, users can register their training and exercise requirements with a broker for dissemination to proposed providers. Where feasible, these requirements will be nested within the MTEP process; however, coordination can occur in lieu of the deliberate MTEP process where it becomes necessary to accommodate emergent requirements. Thanks to existing NATO forum, the CHM allows for:

- a. Deliberate active programming processes;
- b. Greater coordination of NATO and national training and exercise requirements;
- c. Better utilization of existing training and exercise forums.

Co-Led Exercises – Exercises commonly planned and conducted by NATO and a Partner/NNE, as agreed in accordance with this policy (see also NATO-led exercises, Partner-led exercises).

Collective Training – Training designed to prepare teams, units and other elements to perform military tasks in accordance with defined standards. Collective training includes procedural drills and practical application of doctrine, plans and procedures to acquire and maintain collective tactical, operational and strategic capabilities (definition found on NATO Terms).

Cooperation – The action/process of Partners/NNEs and NATO working together to achieve common goals, through the mutual involvement of Partners/NNEs and NATO in each other’s E&T events (see also Involvement, Participation for better understanding).

Department Head – DHs are appointed by HQ SACT. HQ SACT selections of DHs outside of the NCS require MC approval or, for a Partner or NNE, MC endorsement and NAC approval.

Disciplines Forum – This Forum, held annually in February and co-chaired by ACOS SHAPE J7 and ACOS JFD and participated by all Discipline Requirements Authority representatives and Department Heads, sets the conditions for success within the discipline by developing direction and guidance for the coming year.

Distance Learning (Education) – Is any form of learning where time, location, or both separate instructors and learners. Distance learning is a sub-set of Distributed Learning. It involves the delivery of standardized training, education or professional development using multiple media and technologies when and where needed. It may involve learner-instructor interaction in both real time (synchronous) and non-real time

(asynchronous). It may involve self-paced asynchronous learner instruction without benefit of access to an instructor. In all instances it involves a physical separation between the learner and instructor and usually occurs outside the confines of the resident training establishment.

Distributed Learning – Is the delivery of standardized training, education or professional development using multiple media and technologies when and where it is needed. It may involve learner-instructor interaction in both real time (synchronous) and non-real time (asynchronous). It may involve self-paced asynchronous learner instruction without the benefit of access to an instructor. It does not necessarily involve a physical distance between the learner and instructor or need occur outside the confines of the resident training establishment or campus. The dispatch of instructors from a training establishment to a unit or another location to conduct training, or the hiring of qualified instructors in other locations to conduct the training on behalf of a training establishment fall within the realm of Distributed Learning.

e-Learning (electronic learning) – Refers to training, education, coaching and information that is delivered digitally. e-Learning is normally delivered through a network or the Internet but it may also be delivered via CD-ROM. In most organisations, personal computers are used to deliver e-learning digitally but personal digital assistants (PDAs) and other wireless devices are increasingly being used. e-Learning therefore includes multimedia CBT (computer-based training) and other forms of technology-assisted learning.

Education – Education is the systematic instruction of individuals that will enhance their knowledge and skills, and develop competencies. It is the developmental activity that enables the individuals to make a reasonable response to an unpredictable situation.

Evaluation (of units and HQs) – The structured process of examining activities, capabilities and performance against defined standards and criteria (definition found on NATO Terms).

Evaluation of E&IT – This is a systematic process designed to collect data to assess the quality and value of an instructional programme. Evaluation determines whether instruction has satisfied the objectives of the instructional programme in the most effective and efficient manner. Effectiveness is measured by the number of successful graduates relative to the cost of instruction. Efficiency refers to the optimal use of resources. Evaluation is either formative or summative; these two forms of evaluation are distinguished by their purpose and techniques as they relate to learners or programmes.

Exercises – A military manoeuvre or simulated wartime operation involving planning, preparation, and execution. It is carried out for the purpose of training and evaluation. It may be a combined, joint, or single service exercise, depending on participating organisations (definition found on NATO Terms).

Exercise Stakeholders - Officer Scheduling the Exercise (OSE), Officer Conducting the Exercise (OCE), Officer Directing the Exercise (ODE), Exercise Director, Director of Evaluation, Evaluation teams, Officer with Primary Responsibility, participants,

visitors, observers and inspectors, Exercise Control staff, Host Nation, Exercise Planning Group, Core Planning Team, Exercise Planning Team (see also Participants, Observers, Visitors, Inspectors for better understanding).

High Profile Exercises – A replacement to the High Visibility Exercises. HPEs include everything from small functional capability demonstrations/exercises to the most robust national joint exercises. HPEs are intended to provide flexibility and operationalize deterrence through the smart combination of exercises and StratCom messaging in support of NATO Deterrence and Defence objectives.

Individual Training – The development of skills and knowledge necessary to perform specific duties and tasks. Individual Training is learned response to predictable situations.

Informal Learning – Is the acquisition of skills and knowledge outside of structured learning events through reading and discussion. Web sites and online discussion groups can be a means to facilitate informal learning.

Inspectors - Exercise Inspectors are sponsored individuals who are obliged by treaty to ascertain specified details of an exercise and have been correctly declared in accordance with that treaty (see also Participants, Observers, Visitors, Exercise Stakeholders for better understanding).

Interaction with Non-NATO Entities – Reciprocal action, communication or involvement in activities with Non-NATO Entities (NNEs).

Internet-Based Training (Web-based training) – Is the delivery of educational content via a Web browser over the public Internet, a private intranet, or an extranet. Internet-based training provides links to learning resources outside of the course, such as references, email, bulletin boards, and discussion groups. It provides the advantages of computer based training while retaining advantages of instructor-led training. Internet-based training is used synonymously with Web-based training and online training.

Invitees – Partners officially invited to join the Alliance.

Involvement – In NATO ETEE broadly includes participants, visitors, observers and other exercise stakeholders (see also Cooperation, Participation for better understanding).

Joint Exercises – Encompasses more than one service.

Leader (instructor) Led e-Learning – Is e-learning that always includes an instructor, coach or facilitator. Learners access real-time (synchronous) materials via video conferencing, an audio or text messaging service such as chat. Or learner's access delayed materials (asynchronous) through threaded discussions or streamed audio or video.

Levels of Proficiency – Are used to differentiate the levels of task, skill and knowledge required for the job and will affect the type and amount of instruction required.

List of Disciplines – Issued by the MC in January based upon input from the Bi-SC to the Requirements Authority Steering Board (RASB) in the last quarter of the preceding year.

Linking – The official recognition of a relationship between National and NATO exercises.

MTEP - The MTEP includes detailed information on significant collective training activities and military exercises. It is produced annually and spans a four-year window. The MTEP includes five chapters: Chapter 1 lists all NATO HQ and NCS Exercises and Training Events. Chapter 2 lists NFS Exercises and Training Events. Chapter 3 lists Exercises and Training Events for Centers of Excellence (COE) and Functional Area Exercises. Chapter 4 lists (NATO) National Exercises and Training Events, reported by Allies. Chapter 5 lists Partner's National Exercises and Training Events, reported by Partners. (For additional information, see ACT Directive 75-4, Military Training and Exercise Programme, pg A-1/A-2, soon to be updated.)

National Exercises – Refers to the Allies and Partners exercises.

Non-NATO Entity (NNE) – Includes International Organizations (IO), Governmental Organizations (GO) of non-NATO Nations, Non-Governmental Organizations (NGO), Non-NATO Multinational forces, Host Nations (when the Host Nation is not a NATO Nation), Contractors on operations, exercises and transformational activities as well as Non-NATO countries that do not otherwise meet the definition for "NATO Partner".

NATO Training Group (NTG) – The NTG is a structure that aims to enhance professionalism, interoperability and standardization among Alliance and Partner forces through improved co-ordination of ETEE, with particular emphasis on supporting operations (Annex B Reference PP, page 2).

NATO exercises – Exercises planned and conducted by NATO.

NATO-led exercises – Exercises planned and conducted by a Partner/NNE and NATO, in which NATO will assume the leading role upon approval, as agreed in accordance with this policy (see also Co-led exercises, Partner-led exercises).

Observers – Exercise observers are sponsored individuals who attend the exercise with a specific military or diplomatic objective to fulfil. Sponsors would normally be either the Host Nation or the NAC. This doesn't include official observers acting in the scope of international treaties as per Paragraph 71 (see also Participants, Visitors, Inspectors, Exercise Stakeholders for better understanding).

Participation - See Participants (see also Involvement, Cooperation for better understanding).

Participants - Individuals and units actively engaged in ETEE activities. Exercise Participants includes personnel from the OSE, OCE, ODE, and each of the participating training audience.

Partner – A NATO Partner refers to Partnership for Peace (PfP), Mediterranean Dialogue (MD), and Istanbul Cooperation Initiative (ICI) countries as well as Partners across the Globe with a partnership programme with NATO.

Partner exercises – Exercises planned and conducted by a NATO Partner.

Partner-Led Exercises – Exercises planned and conducted by a Partner, with the possibility of NATO involvement in accordance with this policy (see also Co-led exercises, NATO-led exercises).

Quality Management – All the activities and resources that an organization uses to direct, control, and coordinate quality (definition found on NATO Terms).

Requirements Authority – RAs are appointed by SACEUR from within ACO. Exceptions to this will be proposed by SACEUR for MC approval.

Task – A composite of related activities (perceptions, decisions, responses) performed for an immediate purpose (definition found on NATO Terms).

Training Needs Analysis – Is a follow on activity to training needs assessment. It is the analysis of the training requirement once it has been determined that training is the desired intervention to a performance problem or opportunity. It can take many forms where the learner population and required training content are analysed to arrive at the recommended E&IT solution(s).

Visitors – Exercise visitors are individuals or small groups (committees etc.) from participating organizations or countries who are invited to attend a designated, programmed and possibly pre-scripted, portion of an exercise (see also Participants, Observers, Inspectors, Exercise Stakeholders for better understanding).