Exercises and training are an important part of NATO’s transformation and of ensuring that NATO trains as it fights and fights as it trains. Lessons Identified (LI) and learned during an exercise must be captured and institutionalized within NATO effectively and efficiently so that the Alliance can obtain maximum benefit from each exercise.

To enhance information sharing in the exercises and training field, the Supreme Allied Commander Transformation tasked the Joint Analysis and Lessons Learned Centre (JALLC) to analyse NATO’s Exercise Reporting Process used within the Exercise, Training, Reporting, and Analysis (EXTRA) Community of Interest (CoI). This report was the second part of a wider study related to NATO’s EXTRA CoI that also included the development and launch of the NATO EXTRA Portal: the single centralized exercise and training related information sharing platform within NATO.

The project team conducted an extensive review of the Strategic Commanders’ (Bi-SC) Collective Training and Exercise Directive 075-003, which sets out NATO’s Exercise Reporting Process in detail, and observed the reporting process conducted during Exercise Trident Jaguar 2014 (EX TRJR14). From comparison and analysis of those two sources of information, the project team were able to identify areas in NATO’s current Exercise Reporting Process that could be improved. Below the existing and proposed Exercise Reporting Processes are illustrated.

The shortfalls identified as a result of the analysis conducted by project team are summarized as follows:

**Shortfall 1** – Bi-SC 075-003 does not explain the Exercise Reporting Process very well in terms of the number, content, timing, and responsibility of the required deliverables, which results in the risk that not all Observations and LI are being captured, analysed, and shared during an exercise.

**Shortfall 2** – Absence of clear guidance in Bi-SC 075-003 as to how Observations and LI should be reported in exercise deliverables (reports) results in the risk that such Observations and LI are not properly addressed/actioned during the Exercise Reporting Process by responsible tasking authorities and/or transitioned into the NATO Lessons Learned process for further staffing and tracking.
Shortfall 3 – The role of the NATO EXTRA Portal is not clearly described in Bi-SC 075-003 and therefore not clearly understood by the EXTRA Col, resulting in the risk that Observations and Lessons are not being efficiently and effectively shared among those who need them.

Shortfall 4 – The process for transitioning LI into the NATO Lessons Learned process is not clearly described in Bi-SC 075-003. Those using the process are not consistently transitioning those LI into the NATO Lessons Learned process for further staffing and tracking, resulting in the risk that they may not be being learned throughout NATO.

ADDRESSING THE SHORTFALLS

The project team suggested improving NATO’s Exercise Reporting Process to address the shortfalls identified by the project team by aligning the process more to what happens in practice (i.e. during an exercise) and by providing additional guidance in Bi-SC 075-003 with regard to the content, format, and timing of exercise reporting deliverables.

Doing so will ensure that all Observations and LI are captured at the right moment in the exercise and fed into the exercise reporting process and, ultimately, the NATO Lessons Learned process where they can be shared and utilized NATO-wide. However, it will be important for all of NATO’s EXTRA agencies and organizations to achieve agreement on how exactly the Exercise Reporting Process should be revised to ensure maximum efficiency and effectiveness. The proposed Exercise Reporting Process is illustrated on the first page of this factsheet.