TRIDENT JUNCTURE 15 (TRJE15) was, without any doubt, the most ambitious exercise that the Joint Warfare Centre (JWC) has ever conducted. Not only was the 14-day exercise record-long, but it also featured 24/7 operations, three levels of Training Audiences (TAs), a record-high participation of real-life international organizations and non-governmental organizations (IOs/NGOs) and a cooperation with the Canadian exercise JOINTEX 15 in the framework of the Connected Forces Initiative (CFI). All of the above made the exercise an important milestone within the exercise delivery and training efforts of JWC. Nevertheless, as we say here: “After the exercise is before the exercise.” On the horizon there are already new and challenging clouds emerging, which will require a similar effort. It is therefore time to revisit the overall exercise design process from an Opposing Force (OPFOR) perspective and to identify areas for further improvement in the delivery of major NATO exercises.

Building the OPFOR model at the Joint Warfare Centre

In the light of NATO’s Strategic Concept of 2010, it became obvious that the JWC needed to shift its focus for the exercises that it delivered. Collective Defence, Crisis Management and Cooperative Security, in this order, are all listed as the core tasks of the Alliance: “The greatest responsibility of the Alliance is to protect and defend our territory and our populations against attack,” as set out in Article V of the Washington Treaty.

In the same context, referencing exercises and training, Members commit to “(...) carry out the necessary training, exercises, contingency planning and information exchange for assuring our defence against the full range of conventional and emerging security challenges, and provide appropriate Visible Assurance and reinforcement for all Allies.”

Indeed, the Alliance’s shift of focus had immediate implications for the way that JWC planned, designed and executed its exercises. In order to include high-intensity warfighting in JWC-led exercises within or outside of Article V scenario settings, it was necessary to replicate the enemy or, in NATO terms, the Opposing Force.

The first time that JWC played out the concept of OPFOR all the way was in the exercise STEADFAST JUNCTURE 2012 (SFJE12). The creator of JWC’s OPFOR capability was Squadron Leader Colin Macpherson, a former member of the Joint Plans, Execution and Coordination Section (JPEC) in the Joint Training Division. He also developed the short definition of OPFOR, which in the absence of a formalized definition within NATO doctrine, still serves as the only existing definition of the OPFOR Mission Statement: “OPFOR is the intellectual application of coherent military and political activity designed to create a realistic, dynamic and challenging Opposing Force to...
enable the NATO Force Commander to meet his agreed Training Objectives in order to demonstrate competence and confidence to undertake the role of NATO Command Structure/NATO Force Structure (NCS/NFS) deployed operational headquarters. OPFOR is a key element of the Comprehensive Approach to training and is also an integral part of scenario development.\(^3\)

In mid-2013, Hungarian Army Lieutenant Colonel Csaba Elekes joined the JPEC Section and quickly found himself supporting the OPFOR in JWC. These two staff officers soon became the face of JWC’s OPFOR. Having been deployed with the Training Team (TT) in 2013 and early 2014, I joined the OPFOR team for the first time during the execution phase of exercise TRIDENT JAGUAR 2014 (TRJR14). This enlarged team soon became known as the “Axis of Evil” within the JWC.

Thanks to Colin’s and Csaba’s dedication and hard work, JWC OPFOR has evolved from a mere MEL/MIL “add-on” to a core part of exercise execution. In mid-2014, looking ahead at the busiest schedule in JWC’s history, it became clear that the Centre needed additional manpower to further develop the JWC OPFOR concept. Luckily, Naval Striking and Support Forces NATO (STRIKFORNATO) had volunteered to act as the framework headquarters for OPFOR in TRJE15. Additionally, we were also assisted by NATO’s Joint Air Power Competence Centre (JAPCC), who once again willingly shared their air expertise. At this point, the only post missing was a staff member from the inside, who would assume the responsibility as the “Chief OPFOR” on behalf of the Officer Directing the Exercise (ODE), or Commander JWC, Major General Reinhard Wolski. Eventually, I was assigned to this position and found myself in the midst of OPFOR’s world of shadows with fictional but quite daring network of modern-day villains and their range of dark arts. The assignment offered the chance to further increase and improve the role of OPFOR.

I am well aware of the ongoing discussions on the importance of OPFOR, but I still intend to describe, and thereby demonstrate, that OPFOR plays an important role in all exercise phases, including: Concept and Specification, Planning and Product Development, Operational Conduct and Exercise Analysis and Reporting. Indeed, the freedom to implement new ideas in TRJE15 derived from a number of factors: (1) JWC had never conducted an exercise with the full commitment of an external HQ throughout the exercise phases; (2) consequently, no Standard Operating Procedure/Standard Operating Instructions (SOP/SOI) existed that described how to effectively integrate that HQ into the OPFOR; (3) the newly developed Sorotan scenario required an early OPFOR contribution.

\section*{Early involvement}

In the newly developed exercise scenario Sorotan, the OPFOR is the fictitious state of “Kamon”—an aggressive dictatorship equipped with fourth and fifth generation military equipment, located in the fictitious geography of “Cerasia”.

The Exercise Specification (EXSPEC) for TRJE15 clearly outlined the primary Training Audience’s (TA) expectations for the exercise. As such, NATO’s Joint Force Command Brunssum (JFCBS)—the primary TA—requested to be challenged in the full spectrum of security challenges of a contemporary crisis, including hybrid warfare. Logically, this meant that we had to study the topic carefully, including the so called “Gerasimov Doctrine”, in order to transform the parameters of the exercise specifications into Kamon’s strategic framework and lay the foundation for STRIKFORNATO and JAPCC OPFOR operational level plan.

The ambition to create challenges at the strategic, operational and tactical levels, in line with the Training Objectives of the TA, created the requirement to think and develop a comprehensive OPFOR plan on all levels. JWC’s scenario creators had an appropriate doctrine for Kamon that facilitated to conduct a broad range of activities, including conventional and asymmetrical military operations as well as political and economic processes, while si-
multaneously conducting effective operations in a contemporary Information environment. Indeed, as reflected in the Gerasimov Doctrine: “The Information space opens wide asymmetrical possibilities for reducing the fighting potential of the enemy... It is necessary to perfect activities in the Information space, including the defence of our own objects.”

Kamon’s operational level plan was developed during a two-week planning event comparable to the Crisis Response Planning (CRP) conducted by the TA. The event took place in the beginning of October 2014 in Lisbon, and it was the first time that the OPFOR team got together. During this meeting, JWC, STRIKFORNATO, JAPCC and representatives from the Canadian Simulation Center (which would eventually conduct JOINTEX 15) developed an operational level OPFOR Concept of Operations (CONOPS). STRIKFORNATO also used this opportunity to get their new-comers on board and up-to-speed on NATO’s overall exercise planning processes. However, in this case, the true challenge was to plan from an aggressor state perspective, which is clearly outside of the mindset of NATO exercise planners in real life!

To facilitate the finalization of the scenario, and incorporate the findings of the OPFOR team, JWC’s Scenario Section organized a Sorotan Wargaming Session at the end of October 2014. Senior representatives from the civilian environment, such as the former UN Special Representative of the Secretary General, Ambassador José Victor da Silva Angelo, were also there to provide valuable insight for the scenario team. The event was important for setting the scenario details and should therefore be considered as a JWC best practice.

During the final preparations of the scenario package for the CRP, the development of the details for the Intel community in the Crisis Intelligence Package (CRIPT) and the regularly distributed Crisis Situation Updates (CSUs), along with the development of the Road to STARTEX and the detailed STARTEX positions highlighted the limitations of using an external HQ as the framework for OPFOR. The drafting of these essential documents provided the TA with situational awareness and required permanent consultation and collaboration between JWC’s Scenario Section and the OPFOR Team. Simply put, it’s basically not possible for an external HQ to stay abreast of the latest developments, and consequently, it cannot contribute effectively to the product development—VTCs, emails and phone calls are not enough to replace face-to-face consultation and an in-depth cooperation. That means that also in the future whenever JWC chooses to follow the TRJE 15 OPFOR model, the core element has to be permanently manned from JWC staff. Only through that, unity of effort between Sce-
The OPFOR plan served as the framework for the MEL/MIL Incident Development Workshop. This procedure proved effective, and should therefore be incorporated as best practice in future JWC exercise planning and delivery processes.

Prior to the MEL/MIL scripting, JWC received another key document that helped develop the storyline for the exercise. The Training Audiences’ Joint Coordination Order (JCO) 06 described the adjustments made on the Exercise Campaign Plan and its impact on “ECISAM”, the so-called NATO mission in the scenario, which occurred in a timeframe that would start slightly before the exercise and end after the ENDEX. It was based on a qualitative assessment of the drafted Road to STARTEX, which was forwarded to the TA prior to the JCO. As such, the JCO served as the last cross-check in the validation of the exercise narrative. On Day Three of the MEL/MIL scripting, after having gone through the final details with JFCBS’s Trusted Agents, the exercise narrative was then shared with the scripters in a Wargaming format, which focused on TA’s joint actions and OPFOR’s counter-actions for each envisaged phase of JCO 06. During this time, JWC’s Chief Analyst described the joint actions of the JCO, whilst the OPFOR actions were explained by the Chief OPFOR. The positive response of the TA led to numerous repetitions of this format during the update briefings as well. Eventually, JWC’s Media Section produced a video of this narrative for the Exercise Control (EXCON) training of more than 500 participants. I would say that it is very important to have this common focus while developing the MEL/MIL and OPFOR can be achieved and maintained throughout the exercise.

OPFOR’s contribution to MEL/MIL development and the execution phase

JWC’s ultimate focus when delivering operational level joint exercises needs to properly identify possible operational dilemmas. In the absence of a clear definition, these could be described as the “operational challenges”, which require a comprehensive review and should be identified within the Campaign Synchronization process, more specifically through Operations Assessment at the operational and tactical levels. Preferably, those dilemmas should have occurred as part of Campaign Synchronization in order to avoid the Joint Task Force getting dragged solely into the “current fight”, and thereby, abandon the ultimate focus areas within operational management. These are described as Monitoring Campaign Progress, Managing Lines of Operation, and Campaign Rhythm, in AJP 3: “Campaign Synchronization is the coordination and prioritization of all efforts of a Joint Force in order to avoid the Operational Plan (OPLAN)”\(^{(5)}\) (AD 80-70).

For exercise designers, it is important to understand that the overall joint process of Campaign Synchronization relies heavily on the quality of the output of two boards: the Assess-
In TRJE15, the core team of Chief Analyst, Chief MEL/MIL and Chief OPFOR followed a new approach. The CONOPS was checked for consistency and used by the team to validate the operational dilemmas as identified during the MEL/MIL Strategy Workshop. The next step was to compare the TA CONOPS against the OPFOR CONOPS, which would form the basis for the detailed development of the main OPFOR joint actions and operations planned for the execution phase. In principle, the team’s approach was very similar to the standard NATO process of Campaign Synchronization where the common understanding of the state of an operation and the recommendations to Commander Joint Force Command feed the development of a possible solution presented to the Commander at the Joint Coordination Board for decision. Further, the comparison of the CONOPS helped develop an "estimated assessment", which formed the basic framework during the exercise. Although this assessment was not based on quantitative and qualitative data analyzed for the medium term review of the campaign, it was helpful for ensuring a realistic approach to OPFOR.

In March 2014, the OPFOR team met at STRIKFORNATO headquarters in Lisbon. Here, we first developed the major OPFOR joint actions/operations for TRJE15 and then shared them in a briefing to the Deputy Commander of STRIKFORNATO. To ensure full transparency, both JFCBS Deputy Chief of Staff and Commander JWC were briefed on the current status of development. Upon approval, the OPFOR plan served as the framework for the MEL/MIL Incident Development Workshop. This procedure proved effective, and should therefore be incorporated as best practice in future JWC exercise planning and delivery processes.

In March 2014, the OPFOR team met at STRIKFORNATO headquarters in Lisbon. Here, we first developed the major OPFOR joint actions/operations for TRJE15 and then shared them in a briefing to the Deputy Commander of STRIKFORNATO. To ensure full transparency, both JFCBS Deputy Chief of Staff and Commander JWC were briefed on the current status of development. Upon approval, the OPFOR plan served as the framework for the MEL/MIL Incident Development Workshop. This procedure proved effective, and should therefore be incorporated as best practice in future JWC exercise planning and delivery processes.

In TRJE15, the core team of Chief Analyst, Chief MEL/MIL and Chief OPFOR followed a new approach. The CONOPS was checked for consistency and used by the team to validate the operational dilemmas as identified during the MEL/MIL Strategy Workshop. The next step was to compare the TA CONOPS against the OPFOR CONOPS, which would form the basis for the detailed development of the main OPFOR joint actions and operations planned for the execution phase. In principle, the team’s approach was very similar to the standard NATO process of Campaign Synchronization where the common understanding of the state of an operation and the recommendations to Commander Joint Force Command feed the development of a possible solution presented to the Commander at the Joint Coordination Board for decision. Further, the comparison of the CONOPS helped develop an "estimated assessment", which formed the basic framework during the exercise. Although this assessment was not based on quantitative and qualitative data analyzed for the medium term review of the campaign, it was helpful for ensuring a realistic approach to OPFOR.

In March 2014, the OPFOR team met at STRIKFORNATO headquarters in Lisbon. Here, we first developed the major OPFOR joint actions/operations for TRJE15 and then shared them in a briefing to the Deputy Commander of STRIKFORNATO. To ensure full transparency, both JFCBS Deputy Chief of Staff and Commander JWC were briefed on the current status of development. Upon approval, the OPFOR plan served as the framework for the MEL/MIL Incident Development Workshop. This procedure proved effective, and should therefore be incorporated as best practice in future JWC exercise planning and delivery processes.

Another necessary change in TRJE15 was the organization of the MEL/MIL. Both the complexity of the exercise and the need to challenge the TA at the strategic, operational and tactical levels tested the existing OPFOR structure by having to act as both the state of Kamon and Kamon’s Armed Forces.

I always found the analogy of MEL/MIL Event Managers combined with Norse mythology quite interesting and appropriate: The Norns spin the threads of fate at the foot of Yggdrasil, the tree of the world. In our case, the Event Managers are effectively the mythical Norns spinning the threads of the exercise story. Each of those threads is the story of one actor’s group. The task for the Event Managers and the Chief MEL/MIL is to ensure the consistency of these threads within the overall story. Ideally, using this approach, every exercise would be constructed like an interactive play and could be described as a story.

In the past, MEL/MIL was organized as events dealing with “Stakeholders”, “Threats” and “Sustainment”. It is questionable whether Event Managers in this construct would be able to handle the complexities of an exercise like TRJE15. In the end, it was decided to try a geographical solution, whereby each Event Manager would control all the actors within his own state, and represent all aspects of the state themselves. The only exception to this was the “Regional Security” event, which was created to manage all international and non-governmental incidents. This geographical-based approach
created a need for close coordination with the deployed White Cell during execution, as White Cell representatives would not only be responsible for role-playing the state actors, but they were also asked to represent both the Lakutan and Tytan Armed Forces, the two other fictitious countries of Cerasia. This coordination was quite challenging because the White Cell was located in Zaragoza, Spain, and the MEL/MIL was run from Stavanger, Norway.

**Execution phase and OPFOR**

From an OPFOR perspective, the geographical Event Manager solution worked reasonably well. During the execution, the internal OPFOR organization was divided into strategic and military cells to replicate the whole state of Kamon. The military cell was further divided into a small Joint Operations Centre (JOC) with the components located in close proximity. By design, the biggest improvement was the introduction of the JOC, which was actually based on a STRIKFORNATO initiative. Every day, the JOC also released the OPFOR Fragmentation Order (FRAGO), which provided detailed information on the planned OPFOR actions for the next 72 hours. In the evening, an OPFOR Situational Awareness Briefing (SAB) was held with the participation of OPFOR component representatives, summarizing the day. Aside from the update, the platform provided the ideal forum for the Chief OPFOR to issue continuous guidance based on the direction from the Exercise Director and an opportunity for key personnel to respond to contingency plans or reactions from the TA. OPFOR conducted the operation almost like a NATO Force Structure HQ by using the “integrated model” while replicating both the operational and tactical level within one organization. The other key component for conducting a successful and well-coordinated execution phase was the close and excellent cooperation between the Chief OPFOR and the Chief MEL/MIL (CDR Mike Angelopoulos). Indeed, this close collaboration with Chief MEL/MIL was essential in developing the exercise storyline and it paid off during execution phase when we were able to quickly overcome challenges and complete all necessary amendments (for example, the introduction of the TA’s LAST-LAST-LAST CHANCE (L3C)) in no time. It proved that in an exercise within the scale of TRJE15, close cooperation between both Chiefs was an absolute necessity!

**The way ahead**

In summary, several changes were introduced to the exercise planning process and the design of TRJE15. This should not come as a surprise to anyone, as JWC must continue to be seen as NATO’s “Center of Excellence” in organizing and executing operational level exercises. Nevertheless, it must be clear that not all changes will prove equally useful for all types of JWC exercises. The effort to use an external OPFOR HQ during the development of the whole range of OPFOR products, such as the CONOPS and JCO, will most likely not be needed for an exercise in the TRIDENT JAGUAR series. That’s mainly because, for NATO Force Structure HQs being certified to conduct small-scale joint operations, both scenario and scope of ambition (as outlined in the Allied Directive 80-98) do not require a complex scenario or a fully manned OPFOR similar to those of the TRIDENT JUNCTURE exercises. From past experience, the key challenge for these HQs will remain their ability to plan and execute the campaign on two-levels simultaneously (tactical and operational), especially when they have decided to follow the Integrated Model.

Overall, there are still areas that need improvement. The aim of JWC exercises is to train and to improve the capabilities of the TA. We have past the point when TAs need an introduction to the process of planning NATO operations. Consequently, the next step should be to focus on improving the output of the planning process. This is only achievable if the Training Teams have a complete understand-
ing of the scenario and possible solutions for all functional areas when they meet the TA. The functional interaction within and outside the HQ, through all stages of the planning process, needs to improve. Additionally, improved communications will increase the coherence of the plan and ensure a better overall outcome of the Crisis Response Planning.

Another area for improvement is a better understanding of joint synchronization and campaign management. As outlined above, there are boards and working groups, which are essential for successfully mastering the joint operational level. One such board is the Assessment Board; without the proper assessment and recommendations from the Assessment Board, the operational dilemmas that JWC attempt to create will not be identified by the Joint Task Force. The quality of this assessment depends on the data gathered in the Data Collection Plan (Annex OO, OPLAN). This plan should therefore serve as a key document for the preparation of the execution phase.

In the past, the Road to STARTEX was merely aimed at providing quantitative data, while in reality the quantitative data is at least equally important. Data analysis and cross-checking against other functional areas (especially those of the Intel and Operations communities) is crucial for the assessment community to achieve full training value from JWC exercises. If JWC is able to focus on relevant data delivery within the execution phase through both MEL/MIL and Response Cells in line with the data collection requirements, we will be capable of increasing the chance of the operational dilemmas being understood by the TA.

We also need to improve our personnel’s understanding of joint synchronization and campaign management. As execution phases normally have a rather high tempo, we might reconsider our engagement in the Battle Staff Training (BST) events. Training BST Trainers could be beneficial, but it will require additional and regular training of our staff across the functional areas. Once achieved, a BST-centric training approach would allow us to shift focus during exercise execution to the quality of the outcome of boards and working groups. This approach will help to differentiate JWC Training Team from Evaluators (who are process-oriented) while providing added value for EXCON. The additional benefit would be to free up some personnel resources towards better analysis of Training Objectives progression.

Interestingly, the assessment community is measuring the progress towards decisive conditions and ultimately towards operational objectives. Following this logic, it should be possible to apply the same approach and methods when measuring the exercise progress towards the Training Objectives. The only required change would be to use effects as specifications of the Training Objectives. This is not a contradiction as effects are described as the change of the behaviour or the physical state of an actor. Data collection and interpretation would require more effort in the preparation and during execution, but instead of “best guessing” at progress, quantitative data could support our arguments and provide a more factual assessment of the TA.

In a nutshell, I would say that, for both the JWC and the TA, TRIDENT JUNCTURE 15 proved to be a very interesting and challenging exercise. Although there is room for improvement in some areas as I explained above, the overall response was quite satisfactory. But, keep it in mind: the world is not getting any safer and there are challenging times ahead! It is our duty to learn and adapt.

END NOTES:
(3) Macpherson, Colin; 2013