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**NATO SCIENCE & TECHNOLOGY BOARD (STB)**

**Establishing the Chief Scientist's Pool of Experts**

**Note by the Chair**

**Background**

1. NATO Headquarter requests for NATO Chief Scientist advice to inform senior military and political strategic decision-making has increased over the last two years and the demand for this advice is predicted to increase further in subsequent years.
2. The Chief Scientist is responsible for delivering timely, evidence-based targeted advice through periodic and focussed guidance on Science & Technology (S&T) issues, activities and impacts to the NATO senior leadership including the Military Committee, Conference of National Armaments Directors, and the North Atlantic Council.

**Proposed Chief Scientist's Pool of Experts**

3. A Pool of experts (hereafter referred to as 'the Pool') to support the Chief Scientist in meeting the growing need for timely strategic advice on a broad range of S&T topics and activities, is proposed. The experts will support the Chief Scientist on NATO Headquarters' requests for strategic advice, when nationally funded expertise would not be appropriate. For example, supporting the Chief Scientist in providing advice when a rapid specific response is required for a NATO Committee.
4. The Pool will consist of world-leading experts who can communicate (both verbal and written) with non-technical senior audiences from NATO Nations government, academic or industry organisations, as well as the experts at the CMRE. These experts may be drawn from the STO Collaborative Network as well as outside of this network. Experts will be from a broad range of natural, physical and social sciences, technology, engineering and mathematical disciplines, to ensure comprehensive advice can be provided on demand. The specific areas of expertise required will be defined by the Office of the Chief Scientist (OCS) and reviewed annually.

5. Annex 1 presents the Terms of Reference for the Pool, including details on the requirement, activities and funding.
6. Annex 2 provides the STO Policy & Directive (PD), which defines the OCS-internal processes for identifying the experts. The PD will be reviewed two years after the establishment of the Pool.

### Decision Sought

7. Unless the Secretary hears to the contrary **by Wednesday 27 November 2024 at 17:30**, the STB will have agreed the Terms of Reference and the associated PD.

(signed)  
Dr Bryan WELLS  
NATO Chief Scientist

Annex 1: Terms of Reference for the Chief Scientist Pool of Experts  
Annex 2: STO PD for Nominating Experts for the Chief Scientist Pool of Experts

2 Annexes

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**Terms of Reference**  
**NATO Chief Scientist's Pool of Experts**

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**Introduction**

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1. The NATO Chief Scientist is responsible for delivering timely, evidence-based targeted advice through periodic and focussed guidance on S&T issues, activities and impacts to the NATO senior leadership including the Military Committee, Conference of National Armaments Directors, and the North Atlantic Council (NAC).
2. NATO's Warfighting Capstone Concept<sup>1</sup> and Strategic Concept<sup>2</sup> both emphasised the importance of Emerging and Disruptive Technologies, how they will alter the character of conflict and how technological primacy will increasingly influence success on the battlefield. Subsequently, NATO Headquarters' requests for Chief Scientist advice to inform senior military and political strategic decision-making has increased.
3. **Requirement.** A Pool of experts (hereafter referred to as 'the Pool') is needed to support the Chief Scientist in meeting the growing need for timely strategic advice on a broad range of S&T topics and activities. The experts will support the Chief Scientist on NATO Headquarters requests for strategic advice, when nationally funded expertise would not be appropriate. For example, supporting the Chief Scientist in NATO Headquarters business continuity exercises requiring a rapid scientific advice response, or strategic advice to NATO Committees.

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**Pool of Experts**

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4. **Membership.** The Pool should include experts from a broad range of natural, physical and social sciences, technology, engineering and mathematical disciplines, to ensure comprehensive advice can be provided on demand. The required technical areas of expertise are defined by the Office of the Chief Scientist (OCS) and reviewed annually.
5. Members of the Pool should be world-leading experts in their field who can communicate (both verbal and written) with non-technical senior audiences, and are from NATO Nations government, academic or industry organisations, as well as the experts at

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<sup>1</sup> 2021 NATO Warfighting Capstone Concept: <https://www.act.nato.int/our-work/nato-warfighting-capstone-concept/>

<sup>2</sup> 2022 NATO Strategic Concept: [https://www.nato.int/cps/en/natohq/topics\\_210907.htm](https://www.nato.int/cps/en/natohq/topics_210907.htm)

the CMRE<sup>3</sup>. These experts may be drawn from the STO Collaborative Network as well as outside of this network. The members will be nominated by their National Representatives, or by the CMRE Director or his representant as appropriate, and any engagement of an expert would ultimately be contingent upon the availability of the expert and the decision of the individual nations or the CMRE that have nominated them.

6. **Tenure.** Experts should in principle be nominated for three years, for an average five days per year, although this could be longer if required. Continuation beyond this time can occur; however, the expert would need to be re-nominated. Nominations will be sought annually to build the pool of experts ensuring good availability and continuity of expertise.

7. **Clearances.** The duties of the experts may require them to have access to NATO classified information and documents. Therefore, all experts are to be security cleared to NATO SECRET, by their national authorities or the CMRE before appointment.

8. Full details on the nomination and selection process is provided in the Policy & Directive.

9. **Activities.** The OCS, upon the request of the Chief Scientist, will contact the designated representant that has nominated the expert in question and request that they be made available for advice activities that could include:

- Supporting the Chief Scientist in wargaming and table top exercises with NATO Committees and the NAC.
- Producing short written reports or presentations for the Chief Scientist on defined S&T topics of strategic imperative.
- Contributing to training, seminars and workshops for NATO senior military and political leaders.

10. However, where urgency is a prime consideration, the OCS will contact the expert directly, on behalf of the Chief Scientist, by appropriate means (e.g. telephone or email) and ask for advice. As soon as possible, the representant that has nominated the expert in question will be contacted and made aware that advice has been sought.

11. **Funding.** The annual budget for the Pool of Experts will be assigned by the Chief Scientist according to the availability of funds.

12. Experts will be reimbursed for travel and subsistence, and time, in accordance with NATO funding policy, as required.

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<sup>3</sup> From this point, in the document, the indication "Nation" or "National" will include also the case in which experts are provided by the CMRE.

**STO Policy & Directive**  
**for Nominating Experts for the Chief Scientist's Pool of Experts**

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**Policy**

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1. **Context.** This STO Policy & Directive (PD) supports the requirement to establish a pool of experts to support the Chief Scientist in meeting a growing need for timely strategic advice to NATO senior military and political leaders on a broad range of S&T topics.
2. **Purpose.** This PD specifies the Science & Technology Organization (STO) internal procedures for the nomination of subject matter experts within the STO network, who can support the Office of the Chief Scientist (OCS) in preparing and reviewing Advice products and supporting the Chief Scientist in senior leadership fora.
3. **Principles.** The STO procedures for nominating experts to join the Pool of Experts (hereafter referred to as 'the Pool') are governed by three principle considerations.
  - 3.1. The Nations and Centre for Maritime Research and Experimentation (CMRE)<sup>1</sup> nominate subject matter experts to the pool, who are:
    - 3.1.1. Competent in a required area of Science & Technology, and
    - 3.1.2. Available for a three-year tenure and an average of five days a year.
  - 3.2. The Nations or the CMRE remain in control of their subject matter experts' time, in particular regarding the prioritisation of National or Centre work versus OCS work.
  - 3.3. Participation in the procedure described in the Directive below remains a National or Centre decision (opt-in).
4. This Policy & Directive will be reviewed two years after approval.

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**Directive**

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5. The procedure described below is conducted on an annual basis by the OCS.

**Process Overview**

6. The nomination of experts to support OCS is triggered by the Chief Scientist who defines the S&T areas of expertise needed in the pool.

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<sup>1</sup> From this point, in the document, the indication "Nation" or "National" will include also the case in which experts are provided by the CMRE.

7. The following process steps will be conducted:
  - OCS issues a call for the identification of experts to the Nations and CMRE;
  - Nations and CMRE conduct the identification of experts and submit their identified experts to OCS;
  - If required, OCS conducts a selection of experts to join the Pool;
  - OCS submits the nomination of experts to the Chief Scientist.
  - The Chief Scientist confirms the selection and appointment of experts.
8. OCS completes the process by contracting and reimbursing nominated experts.
9. The indicative timelines below for the selection and appointment of experts may slip due to unforeseen circumstances.

### Step 1 Identification

10. Each year, the OCS will define the S&T areas of expertise for which nominations will be requested.
11. Within each Allied Nation, the procedure for identifying competent experts and checking their availability is subject to the decision of the **Principal National STB Member** (hereafter referred to as 'the Principal').
  - 11.1. In order to identify competent experts and check their availability, the Principal may:
    - 11.1.1. Engage with the Principal National Members of the STO Scientific and Technical Committees (STC) to solicit suggestions and/or discuss options;
    - 11.1.2. Reach out to directly to National subject matter experts;
    - 11.1.3. Consult with the National Coordinator;
    - 11.1.4. Delegate parts or the entirety of the National identification process to other National STB Members or to the National Coordinator.
  - 11.2. The Principal, through the act of submitting a response to the OCS, confirms that any identified expert is:
    - 11.2.1. Competent in the requested area of Science & Technology;
    - 11.2.2. Available for the three-year tenure period; and
    - 11.2.3. Cleared, in accordance with National priorities and procedures, to NATO SECRET.
  - 11.3. The Principal may consider three different kinds of experts:
    - 11.3.1. **Freelance experts** can be contracted directly to participate in the Pool;

- 11.3.2. **Reimbursable experts** cannot be contracted directly (e.g., due to her/his employment situation or national employment regulations); however, their employing institution can be contracted and task the expert in question for the Pool activities;
- 11.3.3. **Non-reimbursable experts** employed by an Allied government who can participate in the Pool within the scope of the obligations associated with their positions; therefore, no contract may be required.
- 11.4. A National submission to a call for experts should use the nomination form (at Appendix 1) providing the following information for each identified expert:
- 11.4.1. Full Name;
- 11.4.2. Age and Gender;
- 11.4.3. Contact details (in particular email and preferred phone);
- 11.4.4. Affiliation with STO STCs;
- 11.4.5. NATO clearance information;
- 11.4.6. Short profile, CV, or similar summary of the expert's background (typically not more than one page);
- 11.4.7. In addition:
- For reimbursable experts: contact details of the expert's employing institution (usually the contracting office);
  - For non-reimbursable experts: clear statement that no contract is required.
12. The **Chairs of the Scientific and Technical Committees** (STO STC) can provide valuable assistance to expedite the identification of competent experts within the Nations.
- 12.1. Given their intimate familiarity with the network of STO expert, the Chairs may consult directly with Principal National Members of the STO STC to suggest subject matter experts with the required competences from within the network (at the level of the STO STC or at the level of the Technical Teams). It would then be a responsibility of the Principal National Members of the respective STO STC to inform the Principal National STB Member accordingly, who will submit the final response.
13. For the CMRE, the procedure for identifying competent experts and checking their availability is subject to the decision of the **CMRE Director**.

## Step 2 Selection

14. Within one month after the deadline for the submission of identified experts, the OCS reviews the submissions received from Allied Nations and the CMRE.
15. In case the total number of nominations exceeds the number requested the OCS:

- 15.1. Strives for a reasonable balance of nominated experts across Nations and CMRE, and uses diversity as the selection criterion and is applied first across Nations and CMRE, then (within the identified National experts) across STO Panels/Group.
- 15.2. A short-list is provided to the Chief Scientist for final selection decisions.
- 15.3. Immediately following the selection of experts, the OCS informs those Principal National STB Members, who had identified experts, and the CMRE Director as appropriate, of the selection results.

### **Step 3 Appointment and Training**

16. Within six weeks after the deadline for the submission of identified experts, the OCS notifies the nominated expert that they have been accepted into the Pool.
17. The nominated expert will confirm, in writing, their acceptance to join the Pool for a three-year period.
18. New members of the Pool will attend half-a-day of virtual training that covers the following four training requirements:
  - NATO, its organisation, structures and processes;
  - NATO's political and operational priorities as well as the context, including specific planning, operations and policy issues of interest;
  - Their potential role and involvement in Headquarter Advice activities;
  - Ways of working effectively in an international context as an expert supporting the Chief Scientist.

### **Step 4 Contracting, Reimbursement and Management**

19. Experts will be contracted and reimbursed in accordance with the NATO Policies and regulations and the established MOA between the OCS and the CMRE. This will include costs for training and Advice work completed.
20. A daily rate for experts shall be calculated on the basis of the monthly salary of a NATO International Civilian at Grade G20, Step 1, without family, duty station Brussels. For the daily rate, this salary shall be divided by 30. For an hourly rate, the daily rate shall be divided by 8.
21. Staffing lists identifying all expert positions and the appointed experts, including their up-to-date biographies, are maintained by OCS.

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