

COMMUNICATION IN TIMES OF CRISIS¹

COMUNICAÇÃO EM TEMPO DE CRISE

João Carlos de Bastos Jorge Gonçalves

Pilot-aviator, Colonel
Degree in Military Aeronautics / Pilot-aviator from the Portuguese Air Force Academy
Adviser to the Air Force Personnel Commander
Air Force Personnel Command
Av. da Força Aérea Portuguesa, No. 1
2614-506 Amadora, Portugal
jbgoncalves@emfa.pt

Cristina Paula de Almeida Fachada

Psychologist, Lieutenant Colonel in the Portuguese Air Force
PhD in Psychology from the Faculty of Psychology, University of Lisbon
Professor at the Military University Institute (IUM)
Research Collaborator at the IUM Research and Development Centre
Rua de Pedrouços, 1449-027, Lisbon, Portugal
fachada.cpa@ium.pt

Abstract

As an act of sharing and communicating information between a sender and a receiver, communication is essential for life in society, for an organization to function smoothly, both internally and externally, and for it to preserve its reputational value. This is particularly important when it operates in situations of crisis, which are dynamic environments characterised by instability and scenarios that are often unpredictable and influence the perceptions of those to whom the organization is accountable, in other words, public opinion. Like all organizations, the Armed Forces are affected by this phenomenon. Therefore, this study proposes measures to improve the Armed Forces' communication in times of crisis. The study used inductive reasoning, a qualitative research strategy and a case study research design to analyse the answers to semi-structured interviews conducted with 15 military experts from the General Staff of the Armed Forces, the three branches of the Armed Forces and the National Republican Guard, and two civilians. The results were analysed and a model was proposed to improve the AAFP's communication in times of crisis (or crisis communication), consisting of five stages (structure, doctrine, education, training and verification) that are best described as a cycle, which correspond to lines of action.

Keywords: Communication, Crisis, Crisis Communication, Public Relations, Armed Forces.

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Resumo

A comunicação, como ato de partilhar, comungar informação entre um emissor e um recetor, é uma base essencial da vida em sociedade, do bom funcionamento interno e externo de uma organização, e da preservação do seu valor reputacional. Mais ainda, quando o contexto envolvente se caracteriza por uma situação de crise, alicerçada em ambientes dinâmicos, de instabilidade e com cenários frequentemente imprevisíveis, que influenciam a perceção de todos aqueles pelos quais a organização tem responsabilidades, ou, por outras palavras, a opinião pública. Não sendo, naturalmente, as Forças Armadas imunes a esta realidade, foi objetivo desta investigação propor contributos para melhorar a comunicação em tempo de crise desenvolvida pelas Forças Armadas. Ancorado num raciocínio indutivo, associado a uma investigação qualitativa e a um desenho de pesquisa do tipo estudo de caso, analisaram-se as entrevistas semiestruturadas conduzidas a 15 especialistas militares, distribuídos pelo Estado-Maior-General das Forças Armadas, três ramos das Forças Armadas e Guarda Nacional Republicana, e dois civis. À luz das evidências encontradas, foi proposto um modelo de melhoria da comunicação em tempo de crise (ou comunicação de crise), constituído por cinco etapas (estrutura, doutrina, formação, treino e verificação), descritas sob a forma de um ciclo, e pelas correspondentes linhas de ação.

Palavras-chave: *Comunicação, Crise, Comunicação de Crise, Relações Públicas, Forças Armadas.*

1. Introduction

Crisis communication has been extensively studied in order to help organizations understand their target audiences and create plans to communicate with them (R.A. Roque, telephone interview, 17 December 2020).

It has been described as

[...] vital to protect and maintain the credibility and sound operation of organizations, [...] several crisis communication management models have been outlined, in various studies on strategic communication, to minimise the negative impact of events that can negatively affect the image and reputation of an organization, [and of] its products or services. (Diegues, 2011, p. v)

One of many such examples occurred in 1982 and involved Johnson & Johnson's Tylenol (Ruão, 2020b, p. 1). Tylenol was the leading painkiller in the American market, with a 37% share, until an incident with adulterated capsules caused the death of several people (Broom et al. 1994 cited in Ruão, 2020b, p. 3).

Johnson & Johnson's communication and crisis management "policy" included: issuing an initial statement informing the public that the company was not willing to take any risks, even if it cost them millions; working closely with journalists; setting up a crisis office; having the product recalled from the market (31 million bottles) and offering free replacements; investing in a communication campaign urging consumers not to use the painkiller; explaining the situation to employees and including them in the effort to finding solutions and informing / explaining the situation to the community; requesting an audit

of the drug's production line; drafting a statement of principles titled "Our Credo"; and developing a lessons learned guide that is still a part of the company culture to this day (Ruão, 2020b, pp. 2, 4).

The result was a widespread opinion that the company had been an unfortunate victim of a malicious crime, a new, tamper-proof package was developed within a month, and two months later Tylenol was back on the market, accompanied by an advertising campaign that was duly covered by the press (Ruão, 2020b, p. 3).

Another example of the relevance of this topic is the fact that, in 2019 alone, the Institute for Crisis Management (ICM) monitored about 790,000 communications related to negative news stories, some of which still cause problems for the affected organizations (ICM, 2020, p. 1). In addition, other factors must be considered, such as the fact that crises cost money, and that organizations are actually protecting their financial capital, human resources and reputation by investing in preventing, mitigating and / or finding better ways to react to them (Heath, 2010, p. 1). That is, by defining strategies to deal with crises and to preserve the organization's (reputational) value, as well as its ability to operate and / or achieve its mission (Coombs & Holladay, 2002, p. 166).

This reputation, or reputational value, is the outcome of "[...] a process through which target audiences form a mental construct, rather than [a] literal communication of [the organization's] intentions" (Gonçalves, 2010c, pp. 37-38, cited in Diegues, 2011, p. 6).

Crisis communication, which is different from crisis management in the sense that the latter is a preventive approach to potential problems (Diegues, 2011, p. 7), is important because it represents a core value for democracies, that is, the right to information, particularly when public institutions are involved (North Atlantic Treaty Organization [NATO], 2017a, p. 7). In other words, there is a duty to ensure that the public has access to the democratic principle of right to information, that is, to be informed about its environment, about what has happened, what is happening, how the authorities "are" responding and "intend" to respond to a crisis and its potential consequences (NATO, 2017a, p. 7).

The Armed Forces (AAFF) are not immune to these issues, which tend to be of particular interest to the media, especially in times of crisis (R.A. Roque, op. cit.).

Another fact that justifies the relevance of studying communication, particularly crisis communication, is that information is transmitted "[...] at incredible speeds, and often in real time, and thus reaches the organization's current and potential audiences very quickly, [reaching] millions of people" (Diegues, 2011, p. 9).

Against this background, this study's topic is Communication, and the following temporal, geographical and content delimitations have been defined (Santos & Lima, 2019, p. 42):

- The time period covered in the analysis is the present time (February 2021);
- The study examines the AAFF in the national territory, in addition to some areas outside national territory, in order to analyse the practices of other organizations / countries.
- The study analyses the Armed Forces' communication in crisis contexts.

The study's General Objective (GO) is: *To propose measures to improve the AAFF's crisis communication*, and its Specific Objectives (SO) are:

SO1: To analyse the AAFF's crisis communication;

SO2: To analyse the crisis communication practices of similar organizations.

The objectives were achieved by answering a Research Question (RQ): *How can the AAFF improve its crisis communication?*

This document is organized in five chapters, the first of which is this introduction. The next three chapters contain, respectively, the theoretical and conceptual framework, the methodology and method used in the study, and the data presentation, the discussion of the findings and the answers to the research questions. The fifth and final chapter contains the conclusions, which are based on the findings, and the study's contributions to knowledge, limitations, proposals for future studies and practical recommendations.

2. Theoretical and conceptual framework

This chapter presents the state-of-the-art and the analysis model.

2.1. Literature review

This section explores the key concept that guides the study, *Communication*.

Communication “[...] comes from the Latin *communicare*, meaning ‘to make common’, ‘to share’, ‘to confer’” (Porto Editora, 2003-2021).

In simple terms, “communication can be described as the exchange of information between a sender and a receiver, [and is therefore] a two-way process through which sender and receiver create meanings in their own minds” (Cunha, Rego, Cunha, & Cabral-Cardoso, 2003, p. 354).

This exchange of information, i.e., this (communication) behaviour, is “[...] produced intentionally to share a certain purpose” (Ferreira, Neves, Abreu, & Caetano, 1999, p. 176).

Therefore, if communication is synonymous with a “shared act”, anything that can be interpreted as a symbol – actions, words or images – can be used to communicate (Department of Defense [DOD], 2009, p. 5).

As this process involves a sender and a receiver, “the meaning formed by the receiver may not match the meaning the sender gave the message, [and this incongruity] can be premeditated [by using] ambiguous [wording] that can be interpreted in different ways” (Cunha et al., 2003, p. 354).

Moreover, “[...] communication only occurs when the content of the message is interpreted by the receiver in some way. That is, when a response to the message's effect is observed by the receiver” (Ferreira et al., 1999, p. 176). In other words, communication only occurs when the signal is received and interpreted, simply sending the message is not enough” (DOD, 2009, p. 5).

Communication is vital for organizations and is “[...] essential for an organization to have a good relationship with its internal and external audience” (Jacomini, 2011, p. 50). It is often seen as the source of every damage and the remedy that can solve all problems, and it is common (and comfortable) to blame all problems in an organization on communication (Cabin, 1998, p. 82). This reveals some misconceptions within organizations regarding the characteristics and virtues which are often associated with the art of communicating (Cabin, 1998, p. 82).

Therefore, while should not be seen as a symbol nor as a remedy for every problem, communication “[...] functions as a kind of ‘circulatory system’ of organizational life, and is essential to solve many problems and [to] benefit from many opportunities” (Cunha et al., 2003, p. 354).

Still with regard to organizational communication, Argenti (2015) is one of several authors who argue that it is crucial to understand the strategic dimension of communication (or simply *strategic communication*), and the Crisis Communication Office of the Institute of Social Sciences of the University of Minho (ICS/UM) (2015) has stated that there is a difference between *risk communication* and *crisis communication*.

2.1.1. Strategic communication

This type of communication is aligned with an organization’s overall strategy and its aim is to enhance the organization’s strategic positioning (Argenti, 2015, p. 61).

It is a descriptive term used by an increasingly larger number of organizations to describe their units and the services they provide (Hallahan, Holtzhausen, van Ruler, Verčič, & Sriramesh, 2007, p. 7), and “[...] actually relates more to an organization’s management policies than to communication itself” (Carrilho, 2014, p. 79).

From this organizational perspective, strategic communication is aligned with the organization’s global objectives and the principles expressed by its mission, vision and values, and refers to a practical approach focused on effectiveness and results (Kunsch, 2018, p. 20).

Furthermore, “thinking about strategic communication inevitably brings to mind [how] power is exerted through processes, [thus communication should be] seen as [a] basic social process, and not only as communicating information” (Kunsch, 2018, p. 14).

In the political and military contexts, strategic communication is defined as the effort to understand and engage key audiences, in order to create, enhance or preserve the conditions that allow governments to pursue their interests, policies and objectives, through the structured use of programmes, plans, themes, messages and products, coordinated with the actions of the national instruments of power (DOD, 2009, p. B-10).

In military contexts, strategic communication means integrating communication and intelligence capabilities into other military activities, in order to understand and shape the information environment and help NATO achieve its goals and objectives (2017b, p. 4).

2.1.2. Risk communication

According to the ICS/UM (2015), risk communication

concerns the production and exchange of messages about the nature, meaning and control of a risk situation, [and involves] the preparation of public messages to warn populations about threats, [...] in compliance with the rules set by Strategic Communication, and the elaboration of communication plans tailored to the target population, informative and / or engaging messages [...].

In addition to dealing with the exchange of information, advice and opinions real-time between experts and people facing threats to their health and economic or social well-

being (World Health Organization, n.d.), risk communication is also both bidirectional and multidirectional, a commitment that allows people at risk to make informed decisions to protect themselves and their loved ones (Gamhewage, 2014, p. 1).

That is, it is a way to “[...] increase risk awareness [and] keep [populations’] risk perception at moderate to high levels” (Arriaga, Ângelo, Gaspar, Espassadim, & Leiras, 2020, p. 4).

Thus, the aim of risk communication is to share vital information to save lives, protect public health, and change beliefs and / or behaviours (Gamhewage, 2014, p. 2).

An example of risk communication is the type of communication used by the Civil Protection Agency in its awareness-raising campaigns, which ensure citizens’ right to information (Law 27/2006, p. 4697).

2.1.3. Crisis communication

To understand the concept of *crisis communication*, one should begin by analysing, even if briefly, the construct of “crisis”.

A crisis is defined as a significant threat to operations or reputation that can have negative consequences (such as threats to public safety, financial loss or reputation loss) if it is not dealt with appropriately (Coombs, 2014, p. 1).

Therefore, a crisis should be seen as

[...] a major catastrophe that may occur either naturally or as a result of human error, intervention or even malicious intent. It can include tangible devastation, such as the destruction of lives or assets, or intangible devastation, such as the loss of an organization’s credibility or other reputational damage. (Argenti, 2006, p. 259 cited in Jaconi, 2010, p. 63)

Crises evolve quickly and have a large impact. From natural disasters to hostile activities that threaten national interests (United States Air Force [USAF], 2017, p. 27), crises are “[...] democratic, [and] can affect companies regardless of size, [however,] the larger the company, the greater the crisis tends to be” (Bueno, 2009). Therefore, even though the unpredictability (i.e., the surprise factor) that characterises a crisis affects all organizations (Cahen, 2003, p. 82), crises usually “[...] do not explode out of the blue, they evolve gradually, which means that, in most cases, it is possible to avoid or prevent them, or, at least, reduce their impact” (Bueno, 2009).

Crises have a life cycle, an evolution over time, which means they can be dealt quickly and effectively, if the people in charge of managing the crisis are aware of it (Diegues, 2011, p. 8).

With regard to “crisis detection”, there are three warning signs to look out for (Defense Information School [DIS], n.d., p. 6): whether similar organizations are also experiencing a crisis – for example, if there is a problem with the living conditions in one of the branches, the other branches will likely start getting phone calls asking if they have the same problem; an unexpected interest from the media in a given issue – this warning sign is usually detected by the spokesperson or public relations (PR) officer of the organization, who notices that the demand for certain information; the organization’s employees become dissatisfied with working / organizational conditions such as safety, benefits or the working environment, which can lead to loss of control over the flow of information (possibly concerning issues

that interest the media, which are brought to their attention by the employees).

Furthermore, Coombs (2014, p. 4) warns that denying, delaying or ignoring a crisis is not a good solution because the reputational damage is reduced when the organization is the first to report it. Managers think it is best not to publicise a possible crisis because one does not disclose negative information unless one has to, and because there is a chance that the problem will never be discovered if the organization does not report it; however, not reporting a crisis can be dangerous (Coombs, 2014, p. 4).

Thus, the concept of crisis in military communication can be operationalised as any situation that has the potential to influence public opinion and sentiment about the organization in the long term, where “public” refers to all of those to whom the organization is accountable, which, in the case of the military, is an extremely large universe, considering it includes all citizens (DIS, n.d., p. 1).

The Portuguese Navy shares the same perspective (2005, p. 5.1), that “a crisis is an event with high media impact that generates a strong negative response from the public. This can have serious consequences for the organization’s image and credibility (reputation)”. The United States Air Force (USAF) (2015, p. 27) has a similar approach, and adds two measures that can help handle a crisis: implementing procedures to make essential, accurate and timely information available to the public, and employing, when possible, trained experts to liaise with the media on a regular basis, and even more frequently during crises.

Finally, and before addressing the *crisis communication* construct itself, it is useful, as advised by Diegues (2011, p. 24), to understand the phases that usually occur in a crisis, that is, the three phases of the crisis management process (Coombs, 2014, pp. 5-18), specifically, pre-crisis, crisis response and post-crisis (also called proactive, reactive and reflective phases, respectively) (Table 1).

Table 1 – Best practices in the pre-crisis, crisis and post-crisis phases

Pre-crisis	Crisis	Post-crisis
<ul style="list-style-type: none"> - Having a crisis management plan (updated annually); - Having a properly trained crisis management team; - Conducting an exercise to test the crisis management plan and team at least annually; - Pre-drafting template messages, such as statements from top management, press releases, social media messages; - Including a section on crisis communication in the organization’s communication policy. 	<ul style="list-style-type: none"> - Being quick and having an initial response within the first hour; - Being accurate and checking all the facts carefully; - Keeping the spokesperson (i.e. the centralised source) informed of events regarding key message points; - Making public safety the number one priority; - Using all available communication channels, including social media, websites, the intranet and mass communication systems; - Expressing concern / sympathy for the “victims”; - Including employees in the response; - Being prepared to provide psychological counselling (to crisis victims and / or family members); - Centralising decision making and decentralising operations. 	<ul style="list-style-type: none"> - Making the information promised to stakeholders available as soon as it is known; - Updating stakeholders on how the recovery efforts are progressing, including any corrective actions that are taken and any developments in the investigation; - Analysing the crisis management effort for lessons and integrating them into the crisis management system; - Talking to victims and families to determine the organization’s role in commemorative events; - Developing strategies to minimise reputational damage.

Source: Adapted from Argenti (2002), Coombs and Holladay (2002) and Coombs (2014).

Briefly, while crisis management refers to pre-emptively handling any sensitive issues that may emerge, crisis communication refers to “[...] strategies, actions and means to avoid, minimise or counter a crisis situation” (Diegues, 2011, p. 7).

Therefore, crisis communication

[...] concerns the strategic management of message flows between a company / organization and its audience during a negative event, [...] and reflects the need to [manage] handle these communication flows particularly carefully in unstable environments and dynamic contexts with scenarios that are not always predictable. This includes planning communication strategies and actions to minimise or counter the effects of the event. (ICS/UM, 2015)

Furthermore, “[...] it improves employees’ perceptions regarding the instability caused by the crisis and its effects” (Ruão, 2020a, p. 96).

According to the Defense Information School (n.d., p. 8), crisis communication aims to communicate information to interested audiences, accurately and quickly, in direct response to a crisis, in order to minimise danger or disruptions.

Thus, it aims to advise “[...] on how to minimise damage in an effective manner by acting quickly and assertively, [and] to explain how to turn a crisis into an opportunity through effective communication and successful public relations strategies” (School of Communication and Media Studies, n.d.). One aspect the above definitions have in common is the speed of the response, which significantly increases when there is a “state” of crisis preparedness (Coombs, 2014, p. 3).

Another essential measure is to develop crisis communication strategies that “[...] protect the organization’s reputation, interests and image during a crisis” (Diegues, 2011, p. 13).

Thus, to be successful, crisis communication depends on how well an organization has prepared for it, but also on the organization’s credibility (NATO, 2017a, p. 13), on the existence of someone responsible for coordinating the whole process and for ensuring a coherent, consistent and credible communication (J.P. Barbosa, email interview, 19 January 2021), as well as on learning lessons and disseminating in a timely and effective manner (N.S. Rijo, email interview, 1 March 2021), among other factors.

When creating a crisis communication plan, it is important to bear in mind that communication can have an internal and / or external focus, and that, in cases of extreme crisis, internal communication should always have priority (Argenti, 2002, p. 104). That is, the priority is to keep the organization’s employees informed (Coombs, 2014, p. 3). However, most managers often neglect to do so and instead tend to focus on defining external communication policies rather than on maximising the potential that comes from including the organization’s employees in finding a solution (Coombs, 2014, p. 3).

Finally, in operational terms, crisis communication should be developed (ICS/UM, 2015) by:

- Creating a crisis office, preferably set up before a crisis, with a crisis communication team staffed by communication experts and a spokesperson, despite the fact that some institutions are organized according to “[...] a shared responsibilities model [...]”, in which sector managers are also in charge of communication for their sector; furthermore “[...] in times of crisis, communication flows” should be centralised, even

when using email, in which case the sender should “[...] always be the same, in order to ensure consistency of communication”;

- Defining priority audiences, i.e., “the company’s / organization’s employees, the media, customers, opinion leaders and influencers, and the local, regional or national community”, and keeping open channels “[...] to receive feedback. Being open to feedback from the community [is] important because crisis communication should not be one-way communication, it should be welcoming and interactive”;
- Ensuring transparency and security (“accuracy”) of information;
- Respecting the appropriate timing(s) to disclose information, that is, both by doing it at the right time, with an active, rather than reactive, attitude, while being aware that it is “[...] preferable to delay a message slightly rather than issuing rushed statements that will later need to be rectified”, and by avoiding long periods of silence, which can generate discomfort, anxiety or alienation;
- Keeping the tone of the messages clear, simple, short, concise and, as much as possible, unemotional (i.e. avoid negative emotions and, if possible, generate positive ones);
- Monitoring closely and constantly the information available to the public, the media, social networks and / or other external / pressure groups.

2.2. Analysis model

The study was organized as shown in the analysis model in Table 2.

Table 2 – Analysis Model

General Objective				
To propose measures to improve the AFF's crisis communication.				
Research Question				
How can the AAFP improve its crisis communication?				
Specific Objectives	Subsidiary Questions	Concept	Dimensions	Data collection
SO1 To analyse the AAFP' crisis communication.	SQ1 What characteristics the AAFP's crisis communication??	Communication	Strategic communication	Literature review and semi-structured interviews
SO2 To analyse the crisis communication practices of similar organizations.	SQ2 That characteristics the crisis communication practices of similar organizations?		Risk communication	
			Comunicação de crise	

3. Methodology and method

This chapter presents the methodology and method used in the study.

3.1. Methodology

The study uses inductive reasoning, which involves drawing general inferences from observations (Bryman, 2012, p. 26) by “[...] observing specific facts and establishing relationships between them to establish generalisations that can be used to formulate a law or theory” (Santos & Lima, 2019, p. 26).

The research strategy consists of a qualitative analysis, in which “social phenomena are interpreted and meaning is assigned to those phenomena based on patterns found in the data [...]” (Santos & Lima, 2019, p. 27).

The research design is a case study (Santos & Lima, 2019, p. 36) based on semi-structured interviews with experts on the topic.

3.2. Method

The next section presents the study sample, the procedure, the data collection instruments and the data processing technique.

3.2.1. Participants and procedure

Participants. The study sample (Table 3) consisted of 15 military experts from the General Staff of the Armed Forces (EMGFA), the three branches of the Armed Forces and the National Republican Guard (GNR), and 2 civilian experts, distributed by the exploratory and “field” phases (n=2 and n=11², respectively, being the 2 in the exploratory included in the “field phase) and the validation phase (n=6).

Table 3 – Interviewees

Position	Holder	Interview phase		
		E	F	V
Head of the Office of the Chief of Staff of the Navy	Rear Admiral Oliveira Silva			✓
Head of the Office of the Chief of Staff of the Army	Major General José Feliciano			✓
Head of the Office of the Chief of Staff of the Air Force (PoAF)	Major General Rui Freitas			✓
Journalist and former communication advisor to the Governor of Macau, the Ombudsperson and the President of the Republic	José Carlos Vieira			✓
Sports manager / Communication consultant	Carlos Janela			✓
Former Head of PR and Former Spokesperson for the PoAF	Colonel (Ret.) António Seabra		✓	

² This falls within, and even exceeds, N= 6 to 10, the recommended sample size to conduct a study in which “a group of experts with exceptionality [and] with similar questions”, as advised by Rego, Cunha and Meyer (n.d., p. 53).

[Cont.]

Position	Holder	Interview phase		
		E	F	V
Former Head of PR and Former Spokesperson for the PoAF	Colonel (Res.) Rui Roque	✓	✓	
Former Head of PR and Former Spokesperson for the Army	Colonel Jorge Pedro		✓	
Former Head of PR and Former Spokesperson for the Navy	Captain Maurício Barbosa		✓	
Head of PR for the Army	Colonel César Reis		✓	
Spokesperson for the EMGFA	Commander Pedro Serafim		✓	
Head of PR and Spokesperson for the PoAF	Lieutenant Colonel Manuel Costa	✓	✓	
Former Head of Public Information and Events for the PoAF	Lieutenant Colonel Paulo Mineiro		✓	
Head of the PR Division of the National Republican Guard	Lieutenant Colonel João Fonseca		✓	
Communication Director for the Ministry of National Defence, former PR for the PoAF	Lieutenant Colonel Sónia Vicente			✓
Head of PR and Spokesperson for the Navy and the National Maritime Authority	Lieutenant Captain Nádía Rijo		✓	
Former PR Officer for the PoAF	Major Nuno Paixão		✓	

Legend: The interview was conducted during the: exploratory (E), “field” (F) or validation (V) phase.

Procedure. An initial contact was made by phone to potential participants to inquire about their availability to be interviewed, and to assure them of the anonymity and confidentiality of their answers, which all interviewees waived. The interviews were then scheduled (by telephone, email or videoconference, i.e. an alternative to face-to-face interviews, which were strongly limited by the confinement policies to curb the pandemic). All interviewees were asked to validate their answers, in the sense that validation means “giving validity to”, assessing the “value” and “legitimacy” of something (Priberam Dictionary, 2021a, 2021b).

3.2.2. Data collection instruments

Two semi-structured interview scripts were prepared for the “field” and validation phases, respectively.

3.2.3. Data processing technique

A qualitative content analysis was performed on the semi-structured interviews, based on the literature review and the state-of-the-art.

4. Data presentation and discussion of findings

In this chapter, the data collected is analysed and the subsidiary questions and research question are answered.

4.1. The Armed Forces' communication in times of crisis

This section analyses the features of the “crisis communication” practices of the EMGFA and of the three branches of the Armed Forces and answers SQ1.

4.1.1. General Staff of the Armed Forces

The EMGFA has a PR and Protocol service that “has the mission of conducting the EMGFA’s communication, information and PR activities, as well as its protocol activities” (Regulatory Decree No. 13/2015, p. 5275). This service “produces different types of messages, [...] as commanded by the Chief of Staff of the Armed Forces (CEMGFA), [...] to whom it answers directly”, and responds to any situations that arise through the EMGFA Spokesperson (P. S. Serafim, email interview, 29 January 2021).

Thus, “all communication-related activities are directed by the [Admiral] Chief of the General Staff of the Armed Forces (CEMGFA), [and are centralised] in his office, where the Head of Public Relations [of the EMGFA] is responsible for planning, designing, coordinating and monitoring them” (Temporão, Bragança, & Soares, 2016, p. 7).

There is no communication plan that covers communication in crisis situations, and there are no pre-defined scenarios for crisis events, which are assessed and managed as they occur, always in direct coordination with the Admiral CEMGFA, and, as there is no specific team, it is managed by the PR office, which has staff with specific training in the area of communication and pre-drafted messages (P.S. Serafim, op. cit.).

P.S. Serafim (op. cit.) proposed, as an initial measure to improve crisis communication, the creation of a specific strategy, including possible scenarios and teams trained to execute it.

4.1.2. Navy

The Navy’s communication is managed by its Communication, Information and Public Relations Service (CIRP), which answers to the Chief of Staff of the Navy and, through his Office, to the National Maritime Authority (AMN). The CIRP is advised by experts in the areas directly involved in the crisis and its Head is also the Spokesperson for the Navy and the AMN (Navy Staff [EMA], 2005, p. 6.15; N.S. Rijo, op. cit.).

Although there are no exercise plans for the communication area, the CIRP conducts squadron exercises whenever possible. In combination with its regular activities, these exercises are used to test the team’s effectiveness (N.S. Rijo, op. cit.).

The Navy also has pre-drafted template messages to send to different target audiences (three examples of which are listed in Table 4), which serve as a basis to prepare key messages that can be adjusted to different situations, which are handled by the CIRP staff (N.S. Rijo, op. cit.).

Table 4 – Navy template messages

Event	Target audience	Content
All types	"Various"	"The Sea is a strategic vectir for the Portuguese Nation because it is: - The link between separate areas of the national territory (mainland and islands); - An access and communication route with over 80% of the world's countriesm without the need to go throught other nations, which enables freedom of action."
	Students	"The navy is a profession with a future because: - It offers a stable career, advancement opportunities and continuous training, and thus greatly enhances its human resources; - It provides opportunities for personal and cultural growth through training and experience."
	Opinion leaders	"The Navy is important because: - It has considerable freedom of action, even near the coastlines of potential enemies; - It is highly professional, as it requires extremely short response times."

Source: Adapted from EMA (2005, pp. I-1-I-8).

As for doctrine, the Navy document published in 2005, from which the data in Table 4 was taken (EMA, 2005), divides communication into three broad areas – internal communication, external communication and crisis communication –, which are described as interdependent and as a way to achieve the organization’s objectives. One chapter covers crisis communication and includes, in addition to theoretical principles and strategies to deal with crises, a crisis plan that deals with crises in general and a list of actions and learning objectives that should be used as guidelines during a crisis, from the moment it occurs to the post-crisis period (EMA, 2005, pp. 5.1-5.22).

Having a crisis communication plan is especially important because it provides a reference / guideline in situations of crisis, even though it may require some adaptations, depending on the specifics of each situation (J.P. Barbosa, op. cit.).

4.1.3. Army

According to the Army’s organizational structure, the Department of Communication, Public Relations and Protocol, which answers to the Chief of Staff of the Army and is integrated in his Office, is responsible, among other things, for planning, executing and coordinating the Army’s PR, public information and protocol activities (Regulatory Decree No. 11/2015, p. 5238).

The “Army Communication System Strategy 2019-2021” includes an Operational Plan with strategic objectives (StrO) – one of which is “Increasing the capacity and effectiveness of communication in crisis situations” (StrO 10) – and corresponding metrics / initiatives (C.L. Reis, email interview, 11 March 2021; Office of the Chief of Army Staff, 2019, pp. 5-49, 61):

- Conducting prospective studies on the Army’s Crisis Communication;
- Preparing the Army Crisis Communication Manual;
- Planning and preparing the activation and operation of the Crisis Communication Cell (including a resident officer responsible for forecasting, elaborating risk profiles

and conducting exercises to train the team for crisis situations);

- Conducting Crisis Communication exercises.

At this time, the Army does not have a designated team to manage its Crisis Communication; however, there are procedures for crisis situations, involving properly trained personnel, in addition to some predefined crisis scenarios (J.M. Pedro, email interview, 18 January 2021; C.L. Reis, op. cit.)

C.L. Reis (op. cit.) argued that this team should include, or be advised, by staff with a degree in communication. One of the reasons for this is that the high turnover rates make it difficult to build knowledge or relationships of trust with the media (C.L. Reis, op. cit.).

4.1.4. Air Force

The PoAF's communication is managed by the Public Relations and Communication Service (SRPC), which answers to the Chief of Staff of the Air Force (CEMFA) and is integrated in his Office. Its core staff consists of the CEMFA, the Head of his Office and the Head of the SRPC (Regulatory Decree No. 12/2015, p. 5275; M.F. Costa, email interview, 20 January 2021).

At this time, the PoAF has not published any doctrine on communication, with the exception of Directive No. 09/CEMFA/2016 – Online Presence Guide, which, as the name suggests, specifically addresses the conduct of PoAF military and civilian personnel online, and of a publication on accident prevention that contains a chapter on rules for providing information about accidents, which specifies that the process is managed by the SRPC and lists template messages for the general public (Table 5) (PoAF, 1999, pp. 9-1-9.7) that can be adapted to other crisis situations (M.F. Costa, op. cit.; N.F. Paixão, email interview, 29 January 2021).

Table 5 – Air Force template messages

Event	Target audience	Content
Aircraft accident	All types	“The Air Force informs that on (date and time of accident), at (location of accident) and accident occurred with a Portuguese Air Force aircraft (type of aircraft), belonging to (specify Air Base). The aircraft was conducting (type of operation the aircraft was conducting at the time of the accident) and, for causes unknown, (briefly describe the accident)”
Accidents with other equipment		“The Air Force informs that on (date and time of accident), at (place of accident) an accident occurred when (specify the activity) with (specify the type of equipment or personnel), belonging to (specify Unit or Service). Due to unknown causes, (briefly describe the accident).”

Source: Adapted from PoAF (1999).

To address the lack of published doctrine on this topic, the PoAF General Staff is drafting a Communication Directive for the PoAF and the SRPC has submitted a proposal for a Communication Plan for 2019-2022, which is pending approval (M.F. Costa, op. cit.).

As stated above, there is no designated team responsible for handling crises (M.F. Costa, op. cit.; R.A. Roque, email interview, 19 January 2021), nor any plans or exercises to test the team's communication skills. At one time, there was a proposal (however, it was never implemented) to conduct an exercise simulating an accident situation, which would include

Communication both during training and in its assessment (P.J. Mineiro, email interview, 20 January 2021). This “lack of doctrine and lack of training” has meant that knowledge is not effectively integrated into the organization and is lost when personnel is transferred / rotated (P.J. Mineiro, op. cit.), but also that there is no way to ensure the qualification and certification of the military personnel responsible for communication, and specifically for crisis communication and information management in times of crisis (N.F. Paixão, op.cit.).

This is compounded by a certain organizational rigidity that makes the decision process more complex and leads to longer response times, as the spokesperson must go through different intermediate authorities rather than a “single” authority, or a “single” decision maker, which in this case should be the Chief of Staff (A.M. Seabra, email interview, 22 January 2021; P.J. Mineiro, op. cit.).

4.1.5. Brief overview and answer to Subsidiary Question 1

The answer to SQ1, *What characterises the AAFF’s crisis communication?* is that, while the four analysed organizations have specific differences and are at different stages of development, they have in common the fact their crisis communication is not managed by a specific structure, but rather by PR teams integrated in the Offices of their respective Chiefs of Staffs, which, in specific cases, such as in the event of a crisis, may be advised by experts in the areas affected by that crisis.

Also common to the EMGFA and the branches is the concern with providing PR staff training and exercises to ensure the qualification, certification and requalification of these human resources, although this is currently only done “when the opportunity arises”, i.e., integrated in other military exercises, sporadically, and without an organized, systematic plan. There is also a concern with producing doctrine on Communication, and specifically on Crisis Communication. While the Navy and the Air Force have published some documentation on this topic, including a list of template messages, and the Army is currently drafting its own, there is still a lack of doctrine that must be addressed.

4.2. Crisis communication practices of similar organizations

In this section, three organizations will be analysed – one national organization, the GNR, and two international organizations, the USAF and NATO – and SQ2 will be answered.

4.2.1. National Republican Guard

The GNR’s communication is managed by the Communication and Public Relations Division, which is under the direct dependence of the General Commander (Law No. 63/2007, p. 8047) and is responsible, among other tasks, for staffing the position of official spokesperson, for managing the GNR’s institutional image and PR activities, and thus for handling crises if / when necessary by consulting with experts on specific issues and / or through a multidisciplinary team (J.F. Fonseca, email interview, 2 February 2021).

The GNR has published a Strategic Communication, Public Relations and Image Plan for 2021-2022, which provides some guidelines but does not address specific situations

such as crisis events, as these are already covered in another publication, “Communication Management in Critical Situations”, published in 2010 and currently under revision (J.F. Fonseca, op. cit.).

In this document, the GNR has defined some crisis scenarios, which can be adapted to new and unknown factors that require monitoring and a specific immediate response (J.F. Fonseca, op. cit.).

Therefore, the GNR does not have a designated team responsible for managing crises, staffed by personnel with specific training and multidisciplinary technical expertise (GNR officers’ communication training usually consists of some course modules on communication and the experience / skills they have acquired on the job), and thus cannot respond with the necessary accuracy and speed, which is essential to manage crises (J.F. Fonseca, op. cit.).

4.2.2. United States Air Force

The USAF operates at a global level (that is, worldwide) and has published doctrine on all dimensions of communication, through a line of publications titled Air Force Instruction (AFI), which are mandatory reading, in which the objectives, responsibilities and resources assigned to the strategic, operational and tactical levels are clearly defined. Some USAF publications in the area of communication include AFI 35-101 *Public Affairs Responsibilities and Management* (USAF, 2016), AFI 35-104 *Media Operations* (USAF, 2017), and / or AFI 35-111 *Public Affairs Contingency Operations and Wartime Readiness* (USAF, 2015).

All communication, including crisis communication, is managed exclusively by PR teams, whose main tasks are (USAF, 2016, pp. 5-6, 9): providing reliable advice to leaders; boosting morale and readiness; fostering public trust and support; and leveraging its global influence and deterrence capacity.

The requirements to work in a communications team as a USAF PR Officer are to hold a bachelor’s degree with a specialisation in a related area – such as communication, journalism, PR, visual information, broadcasting, advertising, business / marketing, management, political science, foreign area studies or one of the behavioural or social sciences (USAF, n.d.) –, in addition to the specific training provided by the USAF.

In operational terms, this means that all field commands and units are expected to prepare comprehensive accident communication plans or supplements to existing doctrine (USAF, 2017, p. 27). These plans may be developed prior to or during crisis events or emerging opportunities, such as aircraft accidents, nuclear disasters or incidents in air bases (USAF, 2016, p. 35).

In the interest of national security, the USAF has the policy of disclosing to official media outlets accurate and timely unclassified information (on accidents and incidents, near collisions or lost aircraft) that is perceived as important, regardless of its tone (i.e. whether it is ‘good’ or ‘bad’ news) (USAF, 2017, p. 27).

4.2.3. North Atlantic Treaty Organization

NATO’s communication is organized in several dimensions. The main document is the *NATO Strategic Communications Policy* (2009), which defines the Alliance’s policy and serves

as a basis for other doctrinal manuals, such as NATO's *Practical Guide to Public Information during a Crisis* (2017a). Among other topics, the manual describes how to prepare and deal with communication in times of crisis, from creating plans to liaising with the media, to the complexities of social networks and guidelines on operations outside NATO's borders, with different political, legislative and religious sensitivities (NATO, 2017a). Some examples of other publications on the same topic are the *NATO Military Public Affairs Policy* (2011) and the *NATO Strategic Communication Handbook* (2017c).

NATO's PR policy was first published in 2001 (and revised in 2007 and 2011) to address the increasing demand by the media and the general public for information on NATO, its role, mission, forces and operations during the Kosovo air campaign (NATO, 2011, p. 3).

Therefore, NATO has a PR service that provides timely and accurate information to a wide and diverse audience – including the media – on the complex issues that military personnel face when dealing with the security challenges of the 21st century and on how they support policy makers, both in times of “non-crisis” and crisis (NATO, 2011, p. 2).

In other words, that explains the Alliance's military features / role (that is, its objectives, operations, missions, activities and problems) to the public and increases its credibility as an institution (NATO, 2011, p. 10).

Furthermore, as NATO is an Alliance, its member nations are responsible for informing their own country's citizens about any decisions taken as members of the Alliance, including their participation in operations and activities (NATO, 2011, p. 15). As such, nations, as well as organizations that cooperate closely with Alliance Forces, are free to decide whether to disclose specific details of incidents involving their personnel, property or equipment, including the names of killed or injured personnel, details of damage to property or equipment, the progress of investigations and / or medical treatments / interventions (NATO, 2011, p. 28).

To achieve its objectives, in which communication has a strategic role for the Alliance and the work done by PR units is considered crucial, NATO has committed to improving strategic communication within the Alliance and its allied nations through a centre of excellence, the NATO Stratcom Centre of Excellence (n.d.), and by providing training and exercises to its PR staff – who should have strategic, operational and tactical training, preferably provided through the courses taught at NATO School Oberammergau (n.d.) –, in addition to developing a common doctrine on PR and a lessons learned guide (NATO, 2011, pp. 15-16).

4.2.4. Brief overview and answer to Subsidiary Question 2

The answer to SQ2, *What characterises crisis communication of similar organizations?* is that, all organizations have a PR team responsible for managing their crisis communication, working closely with commanders, based on specific doctrine on communication, in general, and crisis communication, in particular.

Moreover, training in both PR and communication is considered so relevant that NATO offers several PR courses at its Oberammergau School and courses on communication and has a Stratcom Centre of Excellence.

Furthermore, one of the requirements to be recruited as a member of a PR team, both in the USAF and NATO, is to have a degree in social sciences.

4.3. Measures proposed to improve the Armed Forces' crisis communication and answer to the Research Question

The answer to the RQ, *How can the AAFV improve its crisis communication?* is founded in two phases. The first consists of proposing an improvement model based on the issues analysed in this study. The second is the validation / assessment of the potential benefits, usefulness and applicability of the proposed model both by the decision makers who may implement it and by those who will be its target audience, which in this case is the media.

The proposed improvement model is aligned with the strategy and vision of each of the branches and the EMGFA, and consists of a five-step process, which is described in the form of a cycle (Figure 1).

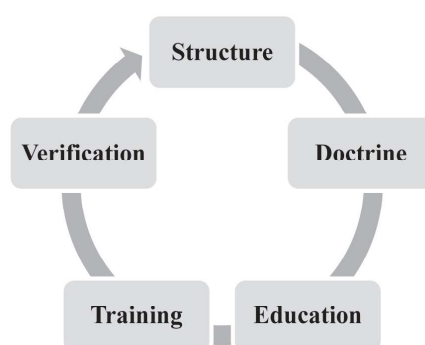


Figure 1 – (Initial) model to improve the AAFV's communication in times of crisis

The lines of action included in the five steps of the model (Figure 1) are, at the level of:

- *Structure*, to create a Crisis Communication cell integrated in the PR teams that operates in all three phases (pre-, during and post-crisis), staffed by personnel with specific training;
- *Doctrine*, first, to elaborate an overarching document on Communication, which specifically addresses Crisis Communication. Second, to publish a document (crisis plan, annual communication plan, or another document) with specific information on the Strategic Directive of the Chief of Staff of the respective branch;
- *Education*, to provide regular refresher and advancement courses in the area of communication and / or PR to PR staff, and especially to the members of the crisis communication cells, who should, among other recruitment requirements, have a degree in Social Sciences and Humanities and / or relevant experience in the area;
- *Training*, to plan and execute crisis communication exercises, both autonomous and / or integrated into force readiness and certification plans, in which staff can practice techniques and procedures in different scenarios, and to ensure the qualification, certification and requalification of PR / communication / crisis communication staff;
- *Verification*, to define a “feedback loop” for the four previous stages, as well as for the process itself, based on the outputs of the lessons learned.

Validation of the (first) proposed model. While all six interviewees agreed that the proposed model can improve the AAFP's crisis communication, the following lines of action may also be taken, at the level of:

- *Structure*, specifically regarding the crisis communication cell, which should not be staffed by personnel exclusively assigned to that unit, but by personnel that can be quickly mobilised when the cell is activated. This non-exclusivity has the added benefit of not “[...] straying too far from the global communication plan” (R.S. Freitas, email interview, 29 March 2021) and of respecting the “principle of economy of human resources [...]” (J.C. Vieira, videoconference interview, 7 April 2021) because, if these human resources’ readiness and immediate mobilisation is ensured, they can provide an immediate response to events “[...] in real time, [when] any statements that are made cannot be taken back” (C. Janela, videoconference interview, 31 March 2021)
- *Doctrine*, which is increasingly necessary “[...] today, [when] everything requires knowledge and doctrine, nothing is [done without it]” (J.A. Feliciano, videoconference interview, 2 April 2021), should be prepared based on “NATO’s [and adjusted] to the context of each AAFP branch” (S.C. Vicente, videoconference interview, 30 March 2021), in order to align it “[...] with the institutional values and [prepare] for phenomena that can affect the organization’s day-to-day activities, [such as] a crisis” (C. Janela, op. cit.).
- *Education*, to have “solid knowledge not only about the organization [but also] communication, PR [and] National Defence” (S.C. Vicente, op. cit.), as well as on topics such as “[...] decision making, leadership and group dynamics [...]” (J.C. Vieira, op. cit.).
- *Training*, which serves to exercise and should include an assessment of “[...] all exercises that are held [and in which this cell’s staff should participate] as the team responsible for the crisis communication aspects of the exercise or operation” (S.C. Vicente, op. cit.) as well as “[...] in integrated exercises and in training [initiatives] with civilian organizations” (R.S. Freitas, op. cit.).
- *Verification*, to “adjust” the timings, both to the type of documents to be reviewed, which may be annual for tactical documents and “every four or five years” for structuring documents (C.O. Silva, videoconference interview, 31 March 2021), and to the “[...] technological advances and the communication context, [which], largely determine this step, [as well as to] organizations’ [need to learn more] about their performance by conducting a critical reflection” (J.C. Vieira, op. cit.). Another important line of action refers to conducting “independent” assessments, as, “despite the fact that there should be a self-assessment of the actions that are taken and the orders given, the final assessment should be conducted by a third party” (C.O. Silva, op. cit.). In other words, “today everything occurs at the level of systems, [is] necessarily [interconnected] and [there is a need to] to ensure that planning and execution are aligned [...]” (J.A. Feliciano, op. cit.). Therefore, “the person that evaluates [the performance] should not [be] the same as the one that executes it, because the proper

distance must be respected and because it adds value to the assessment” (C. Janela, op. cit.).

Based on the above, Figure 2 presents the final version of the model to improve crisis communication and corresponding lines of action.

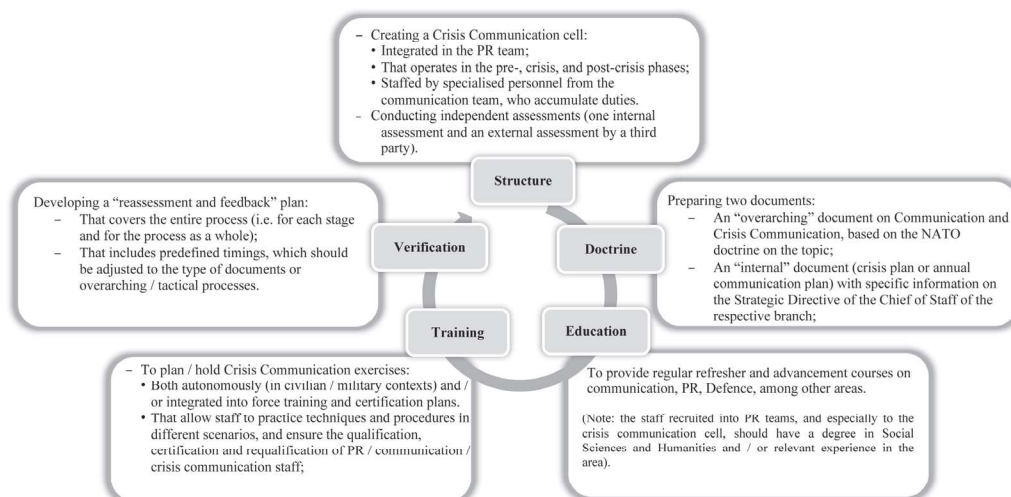


Figure 2 – Final model to improve crisis communication and corresponding lines of action

5. Conclusions

Each year, there are stories in the media about accidents, natural disasters or other events that can be characterised as crises and that have a negative impact on an organization’s image and credibility. This impact can be minimised by timely, effective and tailored communication.

One example of a crisis is the widely studied case of Johnson & Johnson’s painkiller Tylenol. Briefly, in the 1980s, *Tylenol was the leading painkiller in the American market, with a 37% share, and while the sale of adulterated capsules caused the death of several people, as a result of sound communication management, the incident ended up improving the company’s image of credibility in the eyes of the public, and proved decisive in boosting the organizational morale of its employees.*

Therefore, sound communication not only respects the right to information that is a feature of democratic societies – especially information regarding organizations such as the Armed Forces – but also contributes to factors that are essential for an organization’s life, that is, it allows it to survive and operate (internally and externally), both in its day-to-day activities and in times of crisis. Essentially, it helps organizations build, mature, affirm and consolidate a positive reputational image in the society in which they operate.

In terms of methodology, this study used inductive reasoning, a qualitative research strategy and a case study research design.

To achieve SO1, *To analyse the AAF’s crisis communication* and to answer the corresponding SQ1, the crisis communication practices of the EMGFA and of the three

Armed Forces branches were examined. Based on data collected from the literature review and from semi-structured interviews to 11 military experts from these four organizations, the study found that, despite some differences, all have PR teams responsible for crisis communication, integrated in the Office of the respective Chief of Staff, who can be advised by experts in the area affected by the crisis, when appropriate. A concern that all analysed organizations have in common is the training provided to PR staff. Unlike what currently happens, this should be done on a regular basis, according to a structured and systematic plan, to ensure the qualification, certification and requalification of this staff's skills. Finally, in terms of doctrine, while there are some differences between the four organizations, this study found that there is a lack of up-to-date, revised doctrine on communication in general and crisis communication in particular.

To achieve the second objective, *To analyse the crisis communication practices of similar organizations*, and answer the corresponding SQ2, three similar organizations were examined – one national, the GNR, and two international organizations, the USAF and NATO. A literature review was carried out and a content analysis performed on a semi-structured interview with a GNR officer. The study found that, in all analysed organizations, crisis communication is managed by a PR team that works closely with commanders and is based on specific doctrine on communication and crisis communication. Furthermore, communication is seen as crucial by the USAF and NATO. Both organizations have specific recruitment requirements for PR staff, and the communication training provided after recruitment also has specific requirements. One of the recruitment requirements is holding a degree in social sciences. With regard to “continuous” training, NATO provides specific training on PR through its Oberammergau School, and on communication structuring through the Stratcom Centre of Excellence.

Based on the above and on the examination of the GO, *To propose measures to improve the AAFF's crisis communication*, which was achieved by answering the RQ, this would require implementing a model consisting of five stages, which are best described as a cycle, and which correspond to several lines of action. The following areas of intervention were identified; at the level of: *structure*, to create a crisis communication cell integrated in the PR teams, staffed by personnel with specific training, on a non-exclusive basis; *doctrine*, to produce doctrine on Communication and Crisis Communication, adapted from NATO publications and adjusted to the context of the EMGFA and the Branches; *education*, to ensure that PR staff, who should have a degree in Social Sciences and Humanities and experience in the area, are provided regular refresher courses; *training*, both integrated into the planned force readiness and certification exercises and / or exercises that focus on communication, which may include civilian organizations, to ensure the qualification, certification and requalification of PR and crisis communication staff; *verification*, to conduct regular reassessments of each stage and of the process as a whole, in order to integrate feedback and optimise the process.

This study's main **contribution to knowledge** is that it contains scientifically and methodologically validated proposals that the AAFF can use to improve communication in crisis situations, and not only minimise their negative effects but also improve its image as a credible and reliable organization.

The study has one **limitation**, which was extraneous to it and did not significantly affect the findings. Specifically, the confinement policy and other measures to curb the COVID-19 pandemic strongly limited the possibility of conducting face-to-face interviews. To minimise this limitation, the interviews were conducted by videoconference, when possible, or, in the case of email interviews, by contacting the interviewees by phone prior to the interview.

Future studies could examine communication in times of crisis from the perspective of the “means” used to implement it, specifically digital media (internet, intranet and social networks).

The study’s **recommendation** is that the EMGFA and the Branches analyse the proposed model and take steps to implement it.

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