



## HEADQUARTERS ALLIED MARITIME COMMAND

Atlantic Building, Northwood Headquarters, Sandy Lane  
Northwood, Middlesex, HA6 3HP  
United Kingdom  
Mrs Helen Hale



**DATE:** 01 May 2024

**SUBJECT:** IFB-HQMARC-24-01  
INVITATION FOR BID (IFB) FOR **Provision of Exercise Support Services  
For Academics, Key Leader Training and Battle Staff Training, HQ MARCOM  
(DYNAMIC BONUS 24-3)**

**REFERENCE:** Bi-SC Procurement Directive 60-70 dated 30

Dear Madam or Sir,

Your company is hereby invited to participate in the subject Invitation for Bid.

The Bid Closing date for this IFB shall be at **14:00 hours (Greenwich Mean Time)** on **04 June 2024**. In accordance with the Bi-SC Procurement Directive at reference, the bid opening is not public.

Partial bidding is not authorised.

Read carefully the instructions as stated in the bidding documents. Failure to comply with them may cause your offer to be rejected. Your attention is drawn to Part I, the Bidding Instructions, which specifies the procedures to be followed when submitting your bid.

The following documents are integral part of the present IFB:

- a. Acknowledgement of Receipt (Annex A to this cover letter);
- b. The Invitation for Bid IFB-HQMARC-24-01, containing:

Part I: Bidding Instructions (with related enclosures)

Part II: General Provisions

Part III: Statement of Work



## HEADQUARTERS ALLIED MARITIME COMMAND

Atlantic Building, Northwood Headquarters, Sandy Lane  
Northwood, Middlesex, HA6 3HP  
United Kingdom  
Mrs Helen Hale



You are requested to complete and return the Annex A - ACKNOWLEDGEMENT OF RECEIPT as soon as possible, but not later than 15 May 2024 at 16:00 hrs (GMT).

Acknowledgement of Receipt should be emailed to:  
[h.hale2@mc.nato.int](mailto:h.hale2@mc.nato.int) and [a.castleberry@mc.nato.int](mailto:a.castleberry@mc.nato.int)

Further correspondence will be emailed only to those firms that have returned the Annex A and have indicated thereon their intention to participate in the bidding. Your participation in the bidding is greatly appreciated.

Any questions related to the bidding procedure must be referred to the Headquarters Allied Maritime Command Contracting Office. Please include both e-mail addresses to ensure receipt.

Name: **LCDR Anthony Castleberry**  
E-mail: [a.castleberry@mc.nato.int](mailto:a.castleberry@mc.nato.int)

Name: **Helen Hale**  
E-mail: [h.hale2@mc.nato.int](mailto:h.hale2@mc.nato.int)

**This RFP is not to be construed in any way as an offer to contract with your company/institution.**

Sincerely,

Helen Hale  
Senior Contacting Officer  
P&C Branch  
Headquarters Allied Maritime Command

## Annex A-Acknowledgement of Receipt

IFB-HQMARCOCOM-24-01

**ACKNOWLEDGEMENT OF RECEIPT** (to be completed and returned to HQ MARCOM, via email to [a.castleberry@mc.nato.int](mailto:a.castleberry@mc.nato.int) and [h.hale2@mc.nato.int](mailto:h.hale2@mc.nato.int) by **Wednesday 15 May 2024 at 16:00 hrs (GMT).**)

**FROM:** Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Web site: \_\_\_\_\_  
Point of Contact: \_\_\_\_\_

**TO:** HQ MARCOM Contracting Office  
Atlantic Building, Room 3.28  
Northwood HQ,  
Northwood  
HA6 3HP  
United Kingdom

**SUBJECT:** Acknowledgement of Receipt of Invitation for Bid

We hereby advise that we have received IFB-HQMARCOCOM-24-01 for the **Provision of Exercise Support Services for Academics, Key Leader Training and Battle Staff Training, HQ MARCOM, (DYNAMIC BONUS 24-3)**

(enter date) \_\_\_\_\_, including all enclosures.

PLEASE CHECK ONE:

☐ As of this date and without commitment on our part **we DO** intend to participate in the bidding.

☐ **We DO NOT** intend to participate in the bidding and our company may be deleted from the IFB's mailing list.

NOTE: Only bidders indicating their intention to participate in the bidding will continue to receive all further correspondence related to this IFB. Unless specified differently it will be e-mailed to their above-mentioned address(s).

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Name & Title: \_\_\_\_\_

**PART I BIDDING INSTRUCTIONS**

**Table of Contents for PART I – Bidding Instructions:**

1. **General**
2. **Definitions**
3. **Eligibility**
4. **Duration of the Contract(s)**
5. **Exemption from Taxes**
6. **Amendment or Cancellation of IFB**
7. **Bidders Request for Clarifications**
8. **Bid Closing Date**
9. **Extension of Bid Closing Date**
10. **Bid Validity**
11. **Compliance**
12. **Currency**
13. **Pricing Basis**
14. **Contents of Bid**
15. **Bid Submission**
16. **Late Bids**
17. **Bid Withdrawal**
18. **Bid Evaluation**
19. **Clarifications of Bids**
20. **Award**
21. **Communications and Contacts for Clarifications**
22. **“Zero Tolerance Policy”**

**Enclosures to Part I:**

**Enclosure 1: Checklist**

**Enclosure 2: HQ MARCOM Supplier Registration Information**

**Enclosure 3: Compliance Statement for Part I - instructions, Part II – General Provisions and Part III- Statement of Work**

**Enclosure 4: Reference of current or recent contracts**

**Enclosure 5: Pricing Proposal**

1. **Part II- General Provisions**
2. **Part III- Statement of Work**

## 1. GENERAL

1. The purpose of this Invitation for Bid (IFB) is the competitive selection of the technically compliant, lowest priced bid for the provision of Exercise Support for Dynamic Bonus 2024-3 – Academics, Key Leader Training, Battle Staff Training.
2. This is a firm fixed-price, level of effort, non-personal service, requirement-type contract for the provision of the Subject Matters Experts and cost reimbursable, subject to ceilings as defined in the Pricing Proposal (Enclosure 5 to Part I), type contract for associated travel and per diem costs for Headquarters Maritime Allied Command (HQ MARCOM) in Northwood, United Kingdom, in accordance with the specifications set out in Part II and III hereto (General Provisions and Statement of Work).
3. Bidders are advised to read carefully the CONTRACTUAL PROVISIONS (PART II of this IFB) that will apply to any resulting Contract. Therein they will find the stipulations relevant to Acceptance, Payments, etc.

## 2. DEFINITIONS

As used throughout this IFB, the following terms shall have meanings as set forth below:

4. The term "Prospective Bidder" shall refer to the entity that has access this opportunity via the e-procurement portal, and has indicated thereon its intention, without commitment, to participate in the bidding;
5. The term "Bidder" shall refer to the bidding entity that has submitted a bid in response to this IFB;
6. The term "Contractor" shall refer to the bidder to whom the contract is awarded;
7. The term "Contracting Officer" designates the official executing this invitation for bids on behalf of the NATO Headquarters Maritime Allied Command (HQ MARCOM);
8. The term "Contracting Officer's Technical Representative" (COTR) designates the staff element that has the authority to coordinate, monitor and control Contractor's performance;
9. The term "HQ MARCOM" shall refer to the Headquarters Maritime Allied Command, located at Atlantic Building, Northwood HQ, Northwood, HA6 3HP, United Kingdom;
10. The term "ACO" shall refer to the Allied Command for Operations;
11. The term "NATO" shall refer to the North Atlantic Treaty Organisation;
12. The term "days" as used in this IFB shall, unless otherwise stated, be interpreted as meaning calendar days.

13. “Purchase Order” means the contractual document used by HQ MARCOM to order supplies and services.

### 3. ELIGIBILITY

14. This IFB is open to bids from firms that:

- Originate and are chartered/incorporated within any of the NATO-member nations (30)<sup>1</sup>
- Maintain a professionally active facility (i.e.: office/factory/laboratory, etc) within NATO-member nations.

### 4. DURATION OF THE CONTRACT

15. The Contract(s) awarded through this IFB shall be effective upon award, for the period indicated in the Statement of Work
16. The timeline for delivery is an important element of the technical review and any delivery which cannot meet the expected timeframes may result in your bid being deemed technically non-compliant.
17. A Covering Contract Letter and Purchase Order will be issued to the selected contractor upon award.

### 5. EXEMPTION FROM TAXES

18. According to the agreements (Article VIII of the Paris Protocol dated 28 Aug 1952, Article 151 of the COUNCIL DIRECTIVE 2006/112/EC dated 28 November 2006, HM Customs and Excise (PRIV 59/16 / VAT Notice 431), goods and services under the contract are exempt from taxes, duties and similar charges.
19. Where notwithstanding, these are imposed by national regulations, bidders will enclose the list and the amounts of taxes, duties and similar charges which have been included in their bid, with a justification (this does not imply that NATO/HQ MARCOM agrees to pay for any taxes/duties).

### 6. AMENDMENT OR CANCELLATION OF IFB

20. HQ MARCOM reserves the right to amend or delete any one or more of the terms, conditions or provisions of the IFB prior to the date set for the bid closing. An amendment or amendments to this IFB shall announce such action;
21. HQ MARCOM reserves the right to cancel, at any time, this IFB partially or in its entirety. No legal liability on the part of HQ MARCOM for payment of any sort shall arise and in no event shall a cause of action lie with any bidder for the recovery of any costs incurred in connection with preparing or submitting a bid in response hereto. All effort

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<sup>1</sup> The eligible countries are: Albania, Belgium, Bulgaria, Canada, Croatia, Czech Rep, Denmark, Estonia, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Lithuania, Luxembourg, Montenegro, The Netherlands, Norway, North Macedonia, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Turkey, United Kingdom and United States of America.

initiated or undertaken by the bidder shall be done considering and accepting this fact. If this IFB is cancelled prior to the bid opening, the bids already received shall be returned un-opened to the senders upon their request.

#### **7. BIDDERS REQUEST FOR CLARIFICATIONS**

22. Prospective bidders should seek clarification as soon as possible. Any explanation desired by a bidder regarding the meaning or interpretation of this IFB, clauses, specifications etc, must be requested in writing (via email). The Contracting Officer must receive such requests for clarification not later than Thursday 30 May 2024 at 16:00 hours (GMT)
23. Information given to a prospective bidder shall be furnished to all prospective bidders, only if such information is necessary to bidders in submitting offers or if the lack of such information would be prejudicial to other bidders.
24. Oral explanations or instructions shall not be binding unless confirmed in writing by the Contracting Officer.

#### **8. BID SUBMISSION / CLOSING DATE**

25. Bids must be received not later than Tuesday 4 June 2024 at 14:00 hours (BST) as indicated in this IFB, or the authorised extension thereof. At that date and time the bidding shall be closed.
26. The whole bid, to include any submittals, shall be written in English.
27. The BID will contain both the PRICE PROPOSAL and the TECHNICAL PROPOSAL. The PRICE PROPOSAL will be contained in one attachment (Enclosure E) and the attachment labelled as "Price Proposal". The Technical proposal will be assembled as a separate document labelled as "Technical Proposal". If either part of your bid (i.e. Price or Technical) will have more than one attachment please clearly mark all/any attachments as either Price or Technical proposal.
28. The time and date the BID is received by the Purchasing and Contracting Office will be recorded. The BID should be submitted by email to the designated e-mails addresses:  
  
Name: LCDR Anthony Castleberry  
E-mail: [a.castleberry@mc.nato.int](mailto:a.castleberry@mc.nato.int)  
  
Name: Helen Hale  
E-mail: [h.hale2@mc.nato.int](mailto:h.hale2@mc.nato.int)
29. Attachments must be in one of the standard formats (i.e. Microsoft Office well-known extensions \*.doc, \*.docx, \*.xls, \*.xlsx, \*.ppt, pdf, jpeg etc.)



9. EXTENSION OF BID CLOSING DATE

30. Any bidder may request to the HQ MARCOM Contracting Officer an extension of the bid closing date. However, the request must reach the Contracting Officer, in writing not later than Thursday 30 May 2024 at 16:00 hours (GMT), and must include a strong justification for the request. The HQ MARCOM Contracting Officer may, at his/her own discretion, grant an extension of the bid closing date.

10. BID VALIDITY

31. Bids submitted shall remain valid up to 90 days after bid closing date.
32. HQ MARCOM reserves the right to request an extension of validity if a decision cannot be made within this time. Bidder will be entitled to either grant or deny this extension of validity;
33. HQ MARCOM will automatically consider a denial as a withdrawal of the bid.

11. COMPLIANCE

34. The Bidder's proposal must be based on full compliance with the terms, conditions, and requirements of this IFB and any clarifications and/or amendments that may be issued.
35. Each bidder must include in their bid the Compliance statements in accordance with Enclosures 3, (part I) of this IFB. Bidder shall list thereon, if applicable, all deviations from the General Provisions (Part II) and Technical (Part III) Requirements of the IFB.
36. Bidders are reminded that deviations that, in the Contracting Officer's discretion, render the bid non-compliant will result in the Bidder being ineligible for award.
12. Failure to submit completed compliance statements may result in disqualification of the bid.

13. CURRENCY

37. Bidders will quote in GBP. The Bidder will clearly indicate what currency the price proposal is in, failure to bid in the correct currency will result in disqualification.
38. The Contract's value will be expressed in GBP. All payments will be made in GBP.

14. PRICING BASIS

39. All Team Leader and SME prices shall be expressed as fixed and firm prices and will include all associated costs such as delivery to Northwood HQ, Northwood, HA6 3HP, United Kingdom. All per diem and travel costs shall be inclusive, and be on a cost reimbursable basis, subject to a ceiling based on NATO rates.

40. Prices are to be free of all Government taxes and duties and pricing should be as favourable as those extended to any Government, Agency, Private Company, International Organisation, or individual purchasing or handling like Quantities or equipment and/or parts covered by a contract under similar conditions.

15. CONTENTS OF BID

15.1 The bid shall consist of the following minimum documents:

1. A table of contents for the entire bid (please see and tick the checklist provided at Enclosure 1 hereto);
  2. The HQ MARCOM Contractor Registration form (Enclosure 2 hereto);
  3. Compliance Statement for the intended contract and completed Excel SOR (Enclosure 3 hereto);
  4. References of current or recent contracts (Enclosure 4 hereto);
  5. Provision of technical documents:
41. Any appropriate technical information to determine whether Bidder's proposal complies with all the requirements of the IFB.
6. Price Proposal:
42. The Price Proposal shall be submitted in POUND STERLING (GBP) currency on the attached PRICING SCHEDULE (Enclosure 5 hereto).
43. Bidders shall note that partial bidding is not authorised and the bid must be for the full requirements of the SOW.

16. BID EVALUATION

44. The evaluation of bids and the determination as to the technical adequacy of the proposal offered shall be the responsibility of HQ MARCOM and shall be based on information provided by the bidders.
45. HQ MARCOM is not responsible for seeking any information that is not easily identified and available in the bid package.
46. Bids will be evaluated in accordance with the following process whose aim is to select the lowest technically compliant bidder. Selection criteria (PASS or FAIL) will be determined thorough Administrative and Technical Evaluation to ensure bidders compliance with all aspects of this HQ MARCOM IFB (Part I, Part II and Part III of this Invitation for Bidding). This step will also include the determination of the bidder's responsibility<sup>2</sup> to make sure that there are adequate resources to perform the contract and is able to comply with the required or proposed delivery or performance schedule.

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<sup>2</sup> HQ MARCOM reserves the right to verify the results of Bidder's financial analysis through direct use of the Dun and Bradstreet (D&B) reporting system. The D&B analysis of the Bidder shall not highlight risk of business failure.

47. For those bids deemed to PASS the technical evaluation, the second stage will be the Price Evaluation. This will be reviewed in two steps. First, the projected per diem and travel costs will be reviewed for compliance with the pricing information stipulations. Second, and for the sake of determination of the lowest price bid, the total price for the provision of a Team Leader and SME's for the entire delivery of all aspects the SOW, will be the price considered. This is the price contained in box 6E ( highlighted yellow) in the Pricing Table in the Pricing Schedule ( Enclosure 5)

17. AWARD

48. HQ MARCOM will award the Contract to the Bidder(s) whose conforming bid represents the lowest technically compliant solution, where the bid demonstrates that the Bidder(s) can fully accomplish the IFB requirements.
49. Notwithstanding the provision of 8.1 above, HQ MARCOM reserves the right, at any time, to reject any or all bids and/or to not proceed with any award as a result of this IFB.

18. DEBRIEFING

50. Bidders are eligible to receive a debriefing. To obtain that, bidders shall submit a written request to the Contracting Officer within 5 working days of the date on which they receive notification of the aforementioned decision.

19. RIGHT OF PRTOEST

51. Prospective bidders may submit a written protest by registered letter within 10 working days from the publication of the IFB and its specifications. The Contracting Officer will consider the protest and make a decision which will be communicated in writing to the originator within 10 working days from the receipt of the written submission of a protest. The date of receipt will be that of the registered letter receipt. The Protest shall stay the award until the Contracting Officer communicates the decision. If the protest cannot be resolved amicably with the Contracting Officer the IFB will proceed normally.
52. An unsuccessful bidder may submit a written protest by registered letter within 5 working days of the notification of the decision to award. If the protest cannot be resolved amicably with the Contracting Officer, the ACO Head of Contracts shall assess the merits of the protest. A decision will be rendered and communicated by email to the originator within 5 working days from the receipt of the written submission of a protest. The date of receipt will be that of receipt of the email by the Contracting Officer. The Protest shall stay the award until the decision is communicated

20. RIGHT OF APPEAL:

53. An appeal may be submitted in writing via registered letter within 5 working days of receiving the decision to the first level of protest as per the subparagraphs 19.1 here above, for review by the ACO Head of Contracts. A final decision will be communicated in writing within 5 working days from the receipt of the appeal. The Appeal shall not stay the award. Submitting a bid demonstrates acceptance of these conditions and any limitations therein.

21. COMMUNICATIONS

54. Any communication related to this IFB, between a prospective bidder or a bidder and HQ MARCOM shall only be through official communication via the Purchasing and Contracting branch. Designated HQ MARCOM personnel will assist the Contracting Officer in the administration of this IFB. There shall be no contact with other HQ MARCOM personnel. This is to maintain all bidders on equal and competitive footing;

55. POINTS OF CONTACT:

LCDR Anthony Castleberry  
Branch Head Purchasing and Contracting  
Email address: [a.castleberry@mc.nato.int](mailto:a.castleberry@mc.nato.int)

Mrs Helen Hale  
Contracting Office – HQ MARCOM  
E-mail address: [h.hale2@mc.nato.int](mailto:h.hale2@mc.nato.int)

22. ZERO TOLERANCE POLICY

56. All ACO Purchasing and Contracting personnel observes a "zero tolerance" policy and do not accept any type of gift or any offer of hospitality. Bidders are therefore expected not to offer any gift or hospitality during any phase of the acquisition process (i.e. pre-award, award, post-award).
57. By submitting a bid in response to this IFB the bidders implicitly certify that neither the bidders nor their agents or representatives have offered or given any gratuity whatsoever to any NATO personnel with a view to securing a contract or favourable treatment with regard to the award, modification or execution of any contract under this solicitation.
58. The Contracting Officer may, by registered letter, terminate any contract awarded as a result of this solicitation at no cost to HQ MARCOM without notice if it is found, after an investigation that gratuities such as, but not limited to entertainment and gifts were offered or given by the Contractor to HQ MARCOM personnel with the respect to the award of any contract under this solicitation, or to the taking of any decision regarding its execution.
59. If the Contracting Officer established that the provisions stated in paragraphs 22.1, 22.2 and 22.3 above have been disregarded; the bidder(s) may be removed from any NATO source list following consultation with SHAPE and the relevant national authorities.

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**ENCLOSURE 1 TO PART 1-  
CONTENT OF BID / CHECKLIST**

**Content of Bid/ Checklist**

- ☐ **Contractor Registration Form (Enclosure 2 hereto);**
- ☐ **Compliance Statement for the intended Contract (Enclosure 3 hereto);**
- ☐ **Reference of current or recent contracts (Enclosure 4 hereto);**
- ☐ **Bidder's technical Proposal**
- ☐ **Price Proposal (Enclosure 5 hereto)**

**Contractor/Supplier Registration Information**

(\*) = Mandatory field. Data must be entered for registration to be complete.

1) DUNS Number<sup>3</sup>:

2) Tax ID<sup>4</sup>\* (\* If in EU):

Legal Business Name (\*):

Doing Business As (DBA Name):

Core business (\*):

Company's Website address:

Company's Address (\*):

City (\*):

Zip/Postal Code (\*):

Country (\*):

Tel Number:

E-mail:

2) Point of Contact (POC)

Name: Position:

Phone: / Cell phone:

E-mail:

Banking information will be requested separately from the Bidder who is awarded the Contract.

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<sup>3</sup> Data universal Numbering System (DUNS) – Call Dun & Bradstreet at <http://www.dnb.com/>

<sup>4</sup> VAT number mandatory for EU firms and independent contractors.

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ENCLOSURE 3 TO PART 1-  
COMPLIANCE STATEMENT<sup>5</sup>

### COMPLIANCE STATEMENT FOR PARTS I, II & III

**Please cross out section B if it does not apply.**

- A. It is hereby stated that our bid to IFB-HQMARCOM-24-01 is fully compliant with the bidding instructions, General Provisions and Statement of Work, as contained in Part I, Part II and Part III of the IFB.
- B. The following exception(s) are indicated:

**CLAUSE:**      **DESCRIPTION OF DEVIATION:**

This image shows a full page of white paper with horizontal dotted lines. The lines are evenly spaced and run across the width of the page, providing a guide for handwriting practice. There are no margins, text, or other markings on the page.

Date: .....

Signature: .....

Name and Title:.....

Company: .....

<sup>5</sup> Bidders' response to this IFB must be based on full compliance with the terms, conditions, and requirements of the IFB and its future clarifications and/or amendments. The bidder may only offer variations in specific implementation and operational details, provided that the functional and performance requirements are fully satisfied. In case of conflict between the compliance statement and the detailed evidence or explanations/comments furnished, the detailed evidence/comments shall take precedence for the actual determination of compliance. HQ MARCOM reserves the right not to accept the variations offered by the Bidder and, therefore, disqualify the Bidder from this IFB.

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Enclosure 4 to Part I -  
References of current or recent contracts

Bidders should provide at least 2 examples of previous Contract/Agreement, they have delivered for similar goods/services, that are similar in scope and magnitude to the requirement<sup>6</sup>, please indicate:

Contract reference (if applicable)	
Starting date of contract	
End date of contract	
Value of contract	
Customer's name	
Customer's Point of Contact (Name, Email, Job Title). Individual must be capable of providing information on above reference Contract.	

Contract reference (if applicable)	
Starting date of contract	
End date of contract	
Value of contract	
Customer's name	
Customer's Point of Contact (Name, Email, Job Title). Individual must be capable of providing information on above reference Contract.	

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<sup>6</sup> Contracts listed may include those entered into by the Federal Government, agencies of state and local governments, non-profit entities, and commercial concerns. The Bidder may also provide information on problems encountered on the identified contracts and the Bidder's corrective actions.



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**COMMERCIAL-IN-CONFIDENCE (WHEN COMPLETED)**

Provision of Exercise Support Services  
Academics, Key Leader Training and Battle Staff Training  
HQ MARCOM (DYNAMIC BONUS 24-2)

**Price Proposal**

1. Pricing information:
  - a. The daily rate per SME/Team Leader should be a firm fixed all-inclusive rate, with the exception of per diem and reasonable expenses for return travel to and from country of origin (Europe only) to HQ MARCOM.
  - b. The daily per diem rate to be reimbursed will be capped to the NATO ACO rate for the UK, London area.
  - c. The NATO ACO rules applicable to the reimbursement of per diem will be applied.
  - d. A travel day either side of the event phase, is not expected to attract a daily rate, but reasonable per diem expenses may be reimbursed.
  - e. For each 'event' reasonable return travel expenses will be reimbursed. An event is as defined at Paragraph 4 Period of Performance of the SoW, with five separate events defined.
  - f. All prices should be quoted in GBP.
  - g. All prices should be exclusive of VAT.
  - h. Based on the SoW, it is anticipated that the Provider Team should consist of one Team Leader and up to four SMEs covering the areas of technical expertise requested.
  - i. The proposal should include the details of the Team Leader and proposed SMEs to meet the SoW requirements.
  - j. Any changes to the proposal, which lead to a change of price requires the prior approval of the HQ MARCOM Contracting Officer.
  - k. Where possible, the Provider should identify cost savings, provided that they will not impact on the quality of the service provision.

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Bidders must complete the Pricing Table below certify it by completing the following information.

I \_\_\_\_\_ on behalf of the firm

\_\_\_\_\_ confirm we have reviewed this invitation to bid and submit the following pricing, as detailed in the returned Pricing Table

A prompt payment discount of \_\_\_\_% will apply if the invoice is paid in \_\_\_\_working days

Date:.....

Signature: .....

Name and Title:.....

Company: .....

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## Pricing Table

		A.	B.	C.	D.	E	F	G
	Team Member	Daily rate preparation phases Events (1), (2), (3), (4)	Daily rate execution phase Events (5)	Number of days participation	Total cost of TL/SME for the requirement	Estimated number of days of subsistence	Estimated daily subsistence amount	Estimated travel expenses per return trip to MARCOM
1	Team Leader							
2	SME							
3	SME							
4	SME							
5	SME							
6	Totals							

**IFB-HQMARCOM-2024-01**

**Provision of Exercise Support Services  
For Academics, Key Leader Training and Battle Staff Training, HQ MARCOM  
(DYNAMIC BONUS 24-3)**

**PART II GENERAL PROVISIONS**

# HQ MARCOM GENERAL TERMS AND CONDITIONS

## DISPUTES

1. Except as otherwise provided in this contract, all disputes arising under this contract which are not disposed of by agreement shall be decided by the Contracting Authority, who shall reduce his decisions to writing, and furnish a copy thereof to the Contractor.
2. Within thirty days from the date of receipt of such copy, the Contractor may appeal by furnishing to the Contracting Authority a written appeal. In connection with any appeal proceeding under this clause, the Contractor shall be afforded an opportunity to be heard and to offer evidence in support of his appeal.
3. The decision of the HQ MARCOM shall be final unless the Contractor within thirty days of receipt of the decision, requests the Headquarters that the question in dispute be submitted to arbitration.
4. In all cases, the Contractor will proceed diligently with the performance of the contract and in accordance with the decisions of the Headquarters' representatives.

## TERMINATION FOR DEFAULT

5. If the Contractor:
  - a. Fails to perform the services within the time specified herein or any extension thereof;
  - b. Does not cure such failure within a period of 10 days (or such longer period as the Contracting Authority may authorize in writing) after receipt of notice from the Contracting Authority specifying such failure;
6. The Contracting Authority may, subject to the provisions of paragraph b. below, by written Notice of Default to the Contractor:
  - a. Terminate the whole or any part of the contract when its amounts have been officially estimated as likely to be less than £10,000 or equivalent;
7. The Contractor shall not be liable for any excess costs if any failure to perform the contract arises out of causes beyond the control and without the fault or negligence of the Contractor. HQ MARCOM will be informed of the occurrence (and of the termination) of such causes as promptly as possible.
8. In the event the Contracting Authority terminates this contract in whole or in part as provided in paragraph a. of this clause, the Contracting Authority may procure supplies or services similar to those so terminated, in compliance with the rules and procedures established by the Headquarters and the Contractor shall be liable for any excess costs for such similar supplies or services. In such cases, the Headquarters shall pay to the Contractor the contract price for completed supplies or services delivered and accepted less the excess costs if any as stated above. Failure to agree shall be a dispute concerning the clause of this contract entitled 'Disputes'.
9. If, after notice of termination of this contract under the provisions of paragraph a. of this clause, it is determined that the failure to perform this contract is due to causes beyond the control and without the fault or negligence of the Contractor pursuant to the provisions of paragraph b. of this clause, such Notice of Default shall be deemed to have been issued pursuant to the clause of this contract entitled 'Termination for

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Convenience', and the rights and obligations for the parties hereto shall in such event be governed by such clause.

### **TERMINATION FOR CONVENIENCE**

10. The performance of this contract may be terminated whenever the Contracting Authority shall determine that such action is required. The Contractor will be notified in writing (registered letter) at least thirty (30) days prior to date of termination at which time contract will be automatically cancelled. The Contractor will immediately submit any outstanding invoices for supplies or services delivered and accepted prior to termination date for payment.

### **MATERIALS AND WORKMANSHIP**

11. Unless otherwise specifically provided for in the specifications and to the extent the same is applicable to the scope of the Services anticipated under this Agreement, all equipment, materials and articles incorporated in the work covered by this contract are to be new and of the most suitable grade of their respective kinds for the purpose and all workmanship shall be first class. Where equipment, materials, or articles are referred to in the specifications as 'equal to' any particular standard, the Contracting Authority shall decide the question of equality. The Contractor shall furnish to the Contracting Authority for his approval the name of the manufacturer of machinery, mechanical and other equipment, which he contemplates incorporating in the work together with their performance capacities and other pertinent information. When required by the specification, or when called for by the Contracting Authority, the Contractor shall furnish the articles, which he contemplates incorporating in the work. Samples of materials shall be submitted for approval when so directed. Machinery, equipment, materials, and articles installed or used without such approval shall be at risk of subsequent rejection. The Contracting Authority may, in writing, require the Contractor to remove from the work such employees as the Contracting Authority deems incompetent, careless, insubordinate or otherwise objectionable, or whose continued employment on the work is contrary to the interest of the Headquarters.

### **VARIATION IN QUANTITY**

12. No variation in the quantity of any item called for by this contract will be accepted unless such variation has been caused by conditions of loading, shipping, or packing, or allowances in manufacturing processes, and then only to the extent, if any, specified elsewhere in this contract.

### **FORCE MAJEURE**

13. If by reason of any acts of God, war, hostilities, national strike or of any fire at any of the Contractor's premises or those of his suppliers or any act or default of the Contracting Authority, the Contractor shall have been delayed in meeting the requirements of the Contract, the Contractor shall, immediately upon becoming aware that any such delay has been caused, give to the Contracting Authority notice in writing of his claim for an extension of time and the Contracting Authority shall allow the Contractor an extension of time for such completion in respect of any delay caused by any of the circumstances before mentioned as shall be reasonable. Provided always that the Contractor shall not be entitled to any extension of time unless he shall at all times have used all reasonable endeavors to prevent any such delay and to minimise any such delay and to do all that may be reasonable required, to the satisfaction of the Contracting Authority to proceed with the work.

a. National strike, shall mean a strike which has been called by the National or other principal executive of an independent trade union (within the meaning of Sections 5 and 9 of the Trade Union and Labour Relations (Consolidation) Act 1992) which is recognised for negotiation purposes by the Contractor or a supplier whose premises are affected. It shall also be endorsed by a properly conducted ballot of the members affected. It shall also be a strike in which all or elected members of such a union, whether or not employed by the Contractor or a supplier whose premises are affected, have been invited by its National or other principal executive committee to withdraw their labour as part of a National campaign of industrial action.

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- b. Written notice of any claim shall include details of:
- (1) The cause and extent of the delay.
  - (2) Those contractual obligations, which have been affected by the delay.
  - (3) Proposals for minimising the delay, including alternative arrangements.

If such details cannot be provided with the initial and immediate notice of the delay, they shall be provided in writing within 4 weeks of the date of the initial notice, unless otherwise agreed between the Company and the Contracting Authority.

### LIQUIDATED DAMAGES

14. It is recognised by the parties that in the event that any of the Services, Equipment or Material which the Contractor is required under this Contract to provide for the Contracting Authority, not being delivered in the timescales stipulated in this Contract, the Contracting Authority will suffer loss and damage thereby.

15. It is further recognised that all such loss or damage will, having regard to the military and non-commercial purposes for which those the Services, Equipment or Material are being used, either be impossible to quantify comprehensively in financial terms or that it will be complex, difficult and expensive to do so and that loss to NATO and/or its member countries does not admit precise proof or calculation.

16. Accordingly it is hereby agreed, but without prejudice to any other rights under the Contract, that in the event of such delay the Contractor shall be liable to pay the Contracting Authority one-tenth of 1% of the agreed price, per day, for those Services, Equipment or Material which fail to meet the delivery schedule up to a maximum of 6% of the agreed price. The provisions of this Condition are, as stated, without prejudice to any other rights of the Contracting Authority under the Contract. Accordingly, liquidated damages shall be payable hereunder in respect of any material period during which the Contract subsists.

17. No payment or concession to the Contractor by the Contracting Authority or other act or omission of the Contracting Authority shall in any way affect the rights of the Contracting Authority to recover the said liquidated damages or be deemed to be waiver of the rights of the Contracting Authority to recover such damages unless a waiver has been expressly stated in writing by the Contracting Authority.

### RISK OF LOSS

18. Unless the contract specifically provides otherwise and to the extent it is applicable to the Services anticipated hereunder, risk of loss or damage to the supplies provided under this contract shall remain with the Contractor until, and shall pass to HQ MARCOM upon: (1) Delivery of the supplies to a carrier, if transportation is FOB origin; or (2) Delivery of the supplies to HQ MC Northwood at the destination specified in the contract, if transportation is FOB destination.

### LIMITATION OF LIABILITY

18A. Except as otherwise set out in Clause 14, 15, 16 and 17 above neither Party nor their respective Affiliates shall be liable to the other Party, whether in contract, tort (including negligence), for breach of statutory duty, or otherwise, arising under or in connection with this Agreement, for any loss of profit, loss of sales of business, goodwill or revenue, loss of agreements or contracts, loss of anticipated savings or any special, punitive, indirect or consequential loss or damages arising as a result of the performance of this Agreement, howsoever caused and irrespective of any negligence or fault.

18B. Except as otherwise set out in Clause 14, 15, 16 and 17 above the total liability of Contractor hereunder

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shall be limited to the equivalent of the total Contract Price paid by Client hereunder, but shall in no event exceed the amount of Contract Price actually received by Contractor at the time the claim arose.

### **APPLICABLE LAW**

19. Unless otherwise stated, this contract is governed, interpreted and construed in accordance with the laws of England and Wales. Any dispute arising from or in connection with this Agreement that has not been resolved by virtue of Clause 1, 2 and 3 above shall be submitted to the courts of England and Wales for final settlement.

### **CHANGES**

20. Changes in the Terms and Conditions of this contract may be made only by written agreement of both parties.

### **ENTIRE AGREEMENT**

21. This contract sets forth the entire agreement between the parties with respect to the subject matter hereof, and supersedes all prior agreements or representations, oral or written, regarding such subject matter. HQ MARCOM shall not be bound by, and specifically objects to, any term, condition, or other provision inconsistent with or in addition to any provision of this contract that is submitted by Contractor in any correspondence or any document unless HQ MARCOM specifically agrees to such provision in a written instrument signed by an authorized representative of HQ MARCOM.

### **PAYMENT**

22. Payment shall be made within thirty (30) days from receipt of an accurate and validated invoice. No payment shall be made with respect to undelivered supplies/services, work not performed and/or services not rendered under this contract. Payment will be made in the currency of the contract/PO. Invoices will be submitted with the following information: Contract number and/or Purchase Order Number, description of supplies and/or services, quantities, units and prices, taxes exempted, total payment due, accurate banking details, including IBAN, BIC, name of bank, account name. Invoices for partial payment should be clearly marked. Invoices shall be sent to the address listed in the "Bill to" block of the contract/Purchase Order.

### **TAXES AND DUTIES**

23.1 The contract price, including the prices in any sub-contracts hereunder, shall not include any customs charges, taxes or other charges levied by the member nations of NATO, or any political subdivision thereof, from which HQ MARCOM is exempt, on the work performed by the Contractor or his sub-Contractors under this contract.

23.2 To the extent HQ MARCOM is not exempt from such charges by virtue of law, regulation or international agreement, payment for all such charges shall be made directly to the concerned member nations of NATO or any political subdivision thereof by NATO and HQ MARCOM shall hold the Contractor and his sub-Contractors harmless there from. In the event such charges are levied against, and must be paid directly by, the Contractor to his sub-Contractors, HQ MARCOM shall reimburse the Contractor the full amount of the charges upon receipt of the Contractor's invoice and appropriate documentation.

### **WARRANTY**

24.1 Notwithstanding inspection and acceptance by HQMARCOM of supplies furnished under the contract or any provision of this contract concerning the conclusiveness thereof, the Contractor warrants that for a period of time equivalent to standard commercial practices, but not shorter than 12 months after the day of acceptance, all supplies furnished under this contract will be free from defects in material or workmanship and will conform with the specifications and all other requirements of this contract.



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24.2 The Contracting Officer shall give written notice to the Contractor of any breach of the warranties in paragraph 24.1 of this clause within thirty (30) days after discovery of any defect.

24.3 Within a reasonable time after such notice, the Contracting Officer may either:

24.3.1 By written notice require the prompt correction or replacement of any supplies or part thereof (including preservation, packaging, packing and marking) that do not conform with requirements of this contract within the meaning of paragraph 24.1 of this clause; or

24.3.2 Retain such supplies, whereupon the contract price thereof shall be reduced by an amount equitable under the circumstances and the Contractor shall promptly make appropriate payment.

24.4 When return, correction or replacement is required, the Contracting Officer shall return the supplies and transportation charges and responsibility for such supplies while in transit shall be borne by the Contractor. However, the Contractor's liability for such transportation charges shall not exceed an amount equal to the cost of transportation by the usual commercial method of shipment between the designated destination point under this contract and the Contractor's plant and return.

24.5 If the Contractor does not agree as to his responsibility to correct or replace the supplies delivered, he shall nevertheless proceed in accordance with the written request issued by the Contracting Officer under paragraph 24.3.1 to correct or replace the defective or non-conforming supplies. In the event it is later determined that such supplies were not defective or non-conforming within the provisions of this clause, the contract price will be equitably adjusted. Failure to agree to such an equitable adjustment of price shall be a dispute concerning a question of fact within the meaning of the clause of this contract entitled "Dispute".

24.6 Any supplies or parts thereof furnished in replacement pursuant to this clause shall also be subject to all the provisions of this clause to the same extent as supplies initially delivered. Corrected parts will be warranted for a period not less than six (6) months starting at the time the part is received back at the user's location.

24.7 In case of a provisional acceptance the warranty period starts at the date of provisional acceptance and ends twelve (12) months after the date of final acceptance.

24.8 Failure to agree upon any determination to be made under this clause shall be a dispute concerning a question of fact within the meaning of the "Disputes" clause of this contract.

24.9 The word "supplies" as used herein includes related services.

24.10 The rights and remedies of HQMARCOM provided in this clause are in addition to and do not limit any rights afforded to HQMARCOM by any other clause of the contract.

**IFB-HQMARCOT-24-01  
Provision of Exercise Support Services  
For Academics, Key Leader Training and Battle Staff Training, HQ MARCOM  
(DYNAMIC BONUS 24-3)**

**PART III STATEMENT OF WORK**

**Provision of Exercise Support Services  
for  
Academics, Key Leader Training and Battle Staff Training  
HQ MARCOM  
(DYNAMIC BONUS 24-3)**



**STATEMENT OF WORK**

STATEMENT OF WORK

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## **1. BACKGROUND INFORMATION**

- a. This Statement of Work (SOW) outlines the requirements for Exercise DYNAMIC BONUS (DYBS) 24-3 Support Services for Allied Maritime Command (HQ MARCOM), Northwood Headquarters, Northwood, Middlesex, HA6 3HP, United Kingdom. The statement of work covers the performance of service of the period of Academics, Key Leader Training (KLT), Battle Staff Training (BST) and Exercise Support in terms of evaluation, assessment and advice during exercise STEADFAST DUEL (STDU 24).
- b. The Officer of Primary Responsible (OPR) for this requirement will be from the N7 (exercise) division and they will act as the primary interface during execution of this requirement.

## **2. SCOPE OF WORK**

### **a. Introduction**

- (1) The requested Exercise DYBS 24-3 Support Services is for the Academics phase, KLT and the development and execution of the BST in advance. The support is also requested for the execution of STDU 24.
- (2) Academics, KLT and BST will build the foundation as part of the roadmap towards MARCOM's readiness for the STDU 24 execution.
- (3) STDU24 is a SHAPE scheduled operational and tactical level Command Post Exercise/ Computer Assisted Exercise (CPX/CPAX) that trains NATO Command Structure (NCS) and NATO Force Structure (NFS) in executing the Deterrence and Defense of the Euro- Atlantic Area Family of Plans (DDA FoP) within a multi-domain, multi speed and multi scale operations against a peer- adversary (focus effort) and Terror Groups (TGs) contesting NATO in crisis and conflict mainly in the Mediterranean and Black Sea Regions. STDU24 will exercise aspects of DDA at the operational and tactical level. It will further enhance an ACO-wide understanding of the DDA FoP with a focus on Regional Plans (RPs) Southeast, Subordinate Strategic Plans (SSPs), Supported/ Supporting Interrelationship (SSI) and the synchronization of national defense plans with NATO.
- (4) During STDU 24 MARCOM will be in the role of Maritime Theatre Component Commander (MTCC), and Combined Forces Maritime Component Command (CFMCC) in the Area of Responsibility (AOR), and Maritime Component Command (MCC) in one Joint Operating Area (JOA), JOA Southeast (JOA SE).
- (5) The aim of Academics, KLT and BST is to improve the ability of HQ MARCOM to execute its operational level command responsibilities in a Major Joint Operation (MJO), to train HQ MARCOM Decision Making Process (DMP) and refine the Battle Rhythm (BR), playing the three roles simultaneously, and to train MARCOM on their internal processes and procedures as MTCC, CFMCC and MCC before as well as during the execution of STDU 24.
- (6) The BST is intended to build on the academics and effectively prepare HQ MARCOM for responsibility in a Multi-Domain-Operation (MDO) environment through practical exercises with the working groups and boards. HQ MARCOM focus is to increase the understanding of a joint approach on an operational level, the related responsibilities and the necessary synchronization efforts in the framework of exercise STDU 24.
- (7) The Training Audience (TA) for the BST is the MARCOM Command Group (CG) and staff, except those personnel who are mainly involved in real life issues. The level of CG involvement will be determined during the Planning Process.

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(8) MARCOM has limited capacity to design, develop and deliver the BST internally. Thus, external support is required to support and facilitate this training as well as to analyse the execution of STDU24. This external contribution can be considered as an important step to get MARCOM ready for the upcoming certification in 2026.

b. **Training Objectives (TOs)**. The main training objectives of the BST are as follows:

- (1) Prepare HQ MARCOM staff in line with agreed and approved STDU 24 TOs.
- (2) Ensure that key leaders and staff understand their roles and responsibilities within the MARCOM decision-making process (DMP).
- (3) Improve the understanding of MARCOM key leaders and staff contributions to the operational level DMP.
- (4) Facilitate the integration of newcomers into HQ MARCOM BR and DMP.
- (5) Improve information management and dissemination, risk assessment and joint coordination in a MDO environment.
- (6) Improve processes, procedures and products of boards and working groups (WGs), and the interaction between boards and WGs at the different levels.
- (7) Execute and improve MARCOMs BR. Adapt the BR to enable Joint interaction with SHAPE BR and other Commands and Entities.
- (8) Familiarise, refine and practice SOPs and SOIs.

c. **MARCOM BST Delivery**

- (1) The MARCOM BST will be based on the STDU 24 scenario and associated planning products. As this exercise will be simulating an Article 5 operation the majority of the products will be classified NATO SECRET.
- (2) MARCOM DYNAMIC BONUS 24-3 delivery will consist of tailored training for key staff processes and concepts, an Academic / Key Leader Training programme (ACA / KLT), Battle-Rhythm and Battle Staff training (BST) activity as follows:

<b>DYBS24-3</b> Dates tbd post award with Provider	<b>Mon</b>	<b>TUE</b>	<b>Wed</b>	<b>Thu</b>	<b>Fri</b>	<b>Sat</b>	<b>Sun</b>
<b>MARCOM</b>	Staff elements involved in Joint Targeting (lethal and non -lethal), Joint Coordination & Synchronization, Joint Planning, Effects & Execution, Sit. Awareness in Multi Domain Operation environment, Information Operation, Force Protection and Risk management					Weekend	
<b>Company</b>	Deliver targeted & tailored training using Team Leader and SMEs as appropriate						

- (3) **Training on Critical Staff Processes (Dates tbd)**. The purpose of this package is to deliver targeted and tailored training to the staff elements that are responsible for critical staff processes in the HQ, to include Joint Targeting (Lethal and non-lethal), Joint Coordination and Synchronization, Joint Planning, Effects and Execution, Intel, Situational Awareness in a Multi Domain Operation environment, Information operation, Force protection, Assessment

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and Risk management. The training will be delivered during a period to be determined post award.

DYBS 24-3	7 Oct	8 Oct	9 Oct	10 Oct	11 Oct	12 Oct	13 Oct	14 Oct	15 Oct	16 Oct	17 Oct	18 Oct
MARCOM	ACA			BST / BR		Weekend		BST / BR			Adjust & Refine	
Company	KLT & ACA			Advise & Assist BS				Advise & Assist BS			No service required	

### (4) 07- 09 October: ACA / KLT

The purpose of this package is to set the conditions to be able to conduct the BST and ensure common understanding across the HQ of key concepts and BR events. The ACA/ KLT phase will be conducted using a combination of common and separated lectures and discussions between Key Leaders and staff. The specific details of the ACA and KLT programme support will be agreed between the MARCOM N7 and the Provider post award.

(a) ACA 07-09 October. The majority of the Academics will be delivered by HQ MARCOM staff SMEs with some support from the Provider Team Leader and staff SMEs. The ACA will be focused on improving the knowledge of the following key topics in an Article 5 context:

- i. Joint Targeting (lethal and non-lethal)
- ii. Joint Coordination and Synchronization.
- iii. Joint Planning, Effects and Execution.
- iv. Intel, Situational Awareness in a Multi Domain Operation environment
- v. Information Operation
- vi. Force protection
- vii. Boards and WGs and the interaction (Battle Rhythm),
- viii. Assessment and Risk management.
- ix. Lessons Learned from recent exercises of similar scope and scale.

(b) Detailed topics and required support from the Provider will be determined during the BST Planning Process. It is currently not foreseen that Provider SMEs will be involved in more than five topics.

(c) KLT. The KLT phase will be delivered by a combination of MARCOM HQ staff SMEs, the Provider Team Leader and where required, Provider staff SMEs. In addition to some ACA topics above, the following topics should be considered for the KLT: Flag Officers support to the DMP. The KLT will be a maximum of approximately 4 hours in timeframe 7 - 9 October 2024. The exact day depends on the availability of the Command Group and will be determined post award.

### (5) 10-16 October BST:

The Provider will prepare and deliver, in close coordination with MARCOM staff, a mentored 5-day tailored BR cycle and WG training supported by a team of SMEs. This phase will finish with Provider facilitated Feedback that provides areas to improve upon ahead of STDU 24.

(a) MARCOM HQ BR. The DOM will deliver a BR cycle. The BR will be conducted over 5 days to include the key boards and WGs that are required to support the DMP and the joint coordination process in support of the Joint Task Force (JTF) HQ. Specific focus areas during the week may be facilitated with lectures and STDU24 ROAD TO STARTEX

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scenario, and supported by tailored training efforts across functional areas and prioritised boards and WGs. These are to be agreed between the N7 and the Provider.

(b) The Provider will prepare and deliver, in close cooperation with MARCOM staff, support to the tailored battle rhythm cycle and assessment cycle using a combination of STDU24 scenario inputs and training support.

(c) DYBS24 will use planning products and documentation available for the STDU24 CPX. This will include the MCO for use during the Command Post Exercise (CPX). As such, no unique BST Scenario setting will be developed or used. The departure point of the BST will see HQ MARCOM in a scenario which requires a tailored NATO response to an emerging crisis.

(d) The provider must take into consideration that the conduct the BST is to prepare potentially inexperienced HQ MARCOM staff members to prepare to execute STDU24.

### d. MARCOM STDU24 Delivery

STDU 24	21 Oct	22 Oct	23 Oct	24 Oct	25 Oct	26 Oct	27 Oct	28 Oct	29 Oct	30 Oct
MARCOM	STDU Execution									
Company	Observe / Assess / Mentoring (feedback on BR / WG / Products)								AAR / D&G	

- (a) The provider is requested to provide the Team Leader and SMEs to observe, assess and mentor the MARCOM staff for the execution phase of STDU24. The provider's team will support the HQ BR and synchronization activities with higher and subordinate command levels and provide advice on the HQs operational analysis process, the preparation of decisions in the working groups and their synchronization as part of exercise STDU24.
- (b) The provider SMEs should provide feedback to the performance of the WGs on a regular basis to improve their performance throughout the exercise. An appropriate way to address this feedback will be discussed and agreed with MARCOM N7 post award.
- (c) This phase will finish with a Provider facilitated After Action Review (AAR) that provides key areas to work on for subsequent exercises and toward MARCOM certification in 2026.

### 3. ASSUMPTIONS

- a. The planning products required to develop the BST content will be available to the Provider from mid-August 2024 on NS.
- b. MARCOM will conduct a review and refinement of their SOPs and SOIs in the roles of MTCC, CFMCC, and MCC in all JOAs, ahead of the Initial Planning Conference, including the allocation of the workforce in the HQ to the 3 roles.
- c. MARCOM N7 will provide a copy of the MARCOM BR and the applicable JTF HQs BRs during the Initial Planning Conference.



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- d. MARCOM N7 will ensure the Provider has access to the Regional Plans (RPs) and the Subordinate Strategic Plans (SSP) to ensure that the Provider is aware of the maritime SSP content to ensure alignment with terminology, concepts, C2 etc.
- e. There will be a requirement for the Provider Team to be familiar with the MARCOM SOPs/SOIs and the latest concept developments.
- f. The planning products that form the foundation for the BST content will be classified NATO SECRET.
- g. All products generated as a result of Provider support to this SoW will remain the property of HQ MARCOM.
- h. MARCOM N7 staff will facilitate access to HQ MARCOM Class II facilities for the Provider Team when and as required to work on the BST content.

#### 4. PERIOD OF PERFORMANCE

- a. The Provider is required to be present as part of the development and delivery process at the following 5 (five) events:

##### **Preparation Phases:**

**(Working day for the preparation phase is a standard HQ MARCOM working day.)**

- (1) Initial Planning Conference: **Expected to occur between mid-August and mid-September (1 day)**. Required: Team Leader plus 1 SME (SME provisional). Location HQ MARCOM HQ.
- (2) Contractor Team Read-In on NATO SECRET system. **Expected to occur between mid-August and mid-September (3 days)**. Required: Team Leader and all SMEs. Location: TBD. (OPLANS, Joint Co-Ordination Orders, Maritime Co-ordination Orders, and relevant MARCOM SOPs. A detailed list of documents will be provided post contract award)
- (3) Training on Critical Staff Processes. **Expected to occur between mid-August and mid-September (5 days)**. Required: Team Leader and all SMEs. Location: MARCOM HQ. Deliver targeted and tailored training on Joint Targeting (Lethal and non-lethal), Joint Coordination and Synchronization, Joint Planning, Effects and Execution, Intel, Situational Awareness in a Multi Domain Operation environment, Information operation, Force protection, Assessment and Risk management and other topics TBD post award.

##### **Execution Phase:**

**Working day is 12 hours (provisionally 07:00-19:00)**

- (4) DYBS 24-3 Delivery: **07-16 October 2024 (8 working days)**. Team Leader and SMEs; No requirement for participation 12-13 October (weekend). Location: **HQ MARCOM**.
- (5) STDU24 Delivery: **21-30 October (10 working days)**. (Team Leader 21-30 October (10 days); SMEs 21-28 (8 days). Location: **HQ MARCOM**

#### 5. LOCATION OF SERVICE DELIVERY

- a. The Provider will plan to deliver work under this contract at HQ MARCOM in Northwood, UK for all activities. Changes to the place of delivery for preparatory work may be possible but require agreement with the N7 OPR. Where a change of delivery location, leads to a cost saving, this must be transferred on to HQ MARCOM.

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- b. All work will be conducted within secure areas. Security restrictions apply to access all these locations; these restrictions will be communicated to the Provider. The Provider is to plan for the fact that privately owned appliances such as, but not limited to, smart watches, mobile phones and laptops including ancillary equipment e.g. USB sticks, are not allowed into secure areas under any circumstances; this includes all areas of HQ MARCOM.
- c. While not currently foreseen, the Provider may be required to perform duties elsewhere during the periods mentioned above in Para 4. In the unforeseen event that this is required, MARCOM N7 will do their utmost to notify the Provider in reasonable time and facilitate travel to that location.
- d. The classification of the products required to develop the BST content will be at the NATO SECRET level, so all development work will be required to be done in Class II facilities. MARCOM will provide access to the Provider Team Leader and SMEs to HQ MARCOM facilities when it is required to work on the BST content outside of the periods listed in para 4 above. Should the Provider Team Leader or SMEs reside in closer proximity to a NATO facility other than MARCOM HQ, MARCOM N7 staff will try to support access to that NATO HQ when it is required to work on the BST content outside of the periods listed in para 4 above. At HQ MARCOM each member of the Provider team will be provided with a dedicated, individual NS terminal. One NU terminal will be provided.

### 6. TECHNICAL CRITERIA

- a. The Provider must meet all the following technical criteria:
  - (1) Significant knowledge of the new scenario for STDU24 and familiarity with the previous STJU series of exercises as well as RPs, SSPs.
  - (2) Significant first-hand knowledge of the exercise design, development and delivery of STDU24.
  - (3) Experience conducting training at SHAPE or JFC level as an absolute minimum – to include SHAPE’s decision-making process and warfighting HQ role.
  - (4) Have demonstrated expertise in the NATO Crisis Response System and its application at the NATO strategic and operational levels in an Article 5 context.
  - (5) Experience in the past 36 months in working with the Single Service Components operating as Component Commands in a Joint operational context in a NATO Article 5 campaign at SJO+/MJO/MJO+ level, to include the Maritime Component operating as an MTCC, CFMCC and MCC.
  - (6) Experience in the past 36 months in leading the design and delivery of strategic or Joint operational level BST event in a NATO Article 5 campaign at SJO+/MJO/MJO+ level, using the OCCASUS scenario. Experience must include both MEL/MIL and vignette driven training and include KLT, Academics and mentoring support throughout the delivery of the BST.
  - (7) Experience in the past 24 months in conducting Collective Training Events for Operations Assessment (OPSA).
- b. The Provider’s team must meet the following technical criteria:
  - (1) Team leader. The provider’s team must be led by a former Flag Officer with NATO experience at the operational and tactical levels and who meets all the following technical criteria:
    - (a) Have demonstrated recent experience (last 36 months) as a senior mentor / advisor on a NATO exercise or BST at the strategic or joint operational level.

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- (b) Have demonstrated experience with NATO's new strategic DMP and battle-rhythm.
  - (c) Have recent experience (last 36 months) mentoring and training a JFC / SSC on the operational level DMP and battle rhythm and the joint synchronization process.
  - (d) Have demonstrated experience in EXCON in a NATO joint operational exercise or BST including all phases from concept development through delivery to after action reporting.
  - (e) Have demonstrated experience delivering KLT to senior leaders at the operational and SSC level.
  - (f) Holds a valid NATO SECRET Security clearance.
  - (g) Must be present for the periods outlined in Para 4 above.
- (2) SMEs. The provider's team members must include SMEs knowledge in the following areas (Joint Targeting, Joint Coordination and Synchronization, Joint Planning, Effects and Execution, Intel, Situational Awareness in a Multi Domain Operation environment, Information operation, Force protection, Assessment and Risk management) and meet the following technical criteria:
- (a) Have demonstrated experience operating at the strategic and/or operational level within NATO integrating SSCs. (ALL)
  - (b) Have participated in the development process for a NATO strategic, operational or SSC level exercise in the past 36 months (ALL).
  - (c) Have demonstrated experience working in EXCON in a NATO strategic or operational level exercise or BST in the past 36 months. (ALL)
  - (d) Have demonstrated experience in NATO's current ops and joint synchronisation processes, preferably in an instructor or Mentor capacity. (ALL)
  - (e) Hold a valid NATO SECRET Security clearance (ALL).
  - (f) Have demonstrated experience in NATO's targeting and INTEL processes and the new Bi-SC SCD 80-70. (Targeting SME)
  - (g) Have demonstrated experience in the NATO Intelligence cycle and JISR in support of operations, including how to simulate Intel in EXCON. (Targeting / INTEL SME)
  - (h) Have demonstrated experience in NATO Joint Logistics and Sustainment in support of operations at the operational level. (Enablement SME)
  - (i) Have demonstrated experience in Operational Assessment in support of strategic, or operational HQs or organisations and have participated in an OPSA Collective Training Event. (Assessment SME)

## 7. QUALITY CONTROL AND QUALITY ASSURANCE

The Provider must provide evidence that they follow a quality control and quality assurance process (e.g., ISO 9001).

**8. PHYSICAL SECURITY**

- a. Coordination Requirements. In order to access HQ MARCOM (or other designated location) each Provider Team Member shall be required to fill out and return a Personnel Administration Form (PAF).
- b. Physical Access. Final approval for accessing the classified areas is based on the provided documents and is pending final approval of the Headquarters Security Officer. Failure to provide the requested information and documentation in time may will result in access to the facility being denied. HQ MARCOM accepts no liability for costs incurred where access is denied.
- c. Code of Conduct. Each consultant recognises and agrees that they shall conduct themselves in a manner suitable for the purpose of this Contract and in accordance with NATO's Code of Conduct.

**9. LATITUDE AND DISCRETION**

The Provider may suggest deviations to the SoW requirements, if the Provider thinks, based on its long-standing experience, that it would benefit HQ MARCOM. The N7 OPR should be consulted regarding such deviations from the requirements. Any changes to the requirement or proposal that lead to a change in price must have the prior authorisation from HQ MARCOM Contracting Officer.