



HEADQUARTERS ALLIED MARITIME COMMAND

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



DATE: 09 May 2025

SUBJECT: IFB-HQMARCOT-BST-25-01
INVITATION FOR BID (IFB) FOR Provision of Exercise Support Services to HQ MARCOM for Academics, Key Leader Training and Battle Staff Training, (DYNAMIC BONUS 25-2) and mentoring for STEADFAST DUEL 25.

REFERENCE: Bi-SC Procurement Directive 60-70 dated 30 June 2015

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 **16:00 hours (Greenwich Mean Time)** on **16 June 2025**. In accordance with the Bi-SC Procurement Directive at reference, the bid opening is not public.

Partial bidding is not authorised.

Please 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-HQMARCOT-BST-25-01, 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 16 May 2025 at 16:00 hrs (GMT).

Acknowledgement of Receipt should be emailed to:
h.hale2@mc.nato.int and 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

Name: **Helen Hale**
E-mail: h.hale2@mc.nato.int

This IFB 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-HQMARCOT-BST- 25-01

ACKNOWLEDGEMENT OF RECEIPT (to be completed and returned to HQ MARCOM, via email to a.castleberry@mc.nato.int and h.hale2@mc.nato.int by **Friday 16 May 2025 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-HQMARCOT-BST-25-01 for the **Provision of Exercise Support Services to HQ MARCOM for Academics, Key Leader Training and Battle Staff Training (DYNAMIC BONUS 25-2) and mentoring for STEADFAST DUEL 25.**

(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 contract

Enclosure 5: Pricing Proposal

1. GENERAL

1.1 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 2025-2 – Academics, Key Leader Training, Battle Staff Training and mentoring for Dynamic Duel 2025.

1.2 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 travel to 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).

1.3 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:

2.1 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;

2.2 The term "Bidder" shall refer to the bidding entity that has submitted a bid in response to this IFB;

2.3 The term "Contractor" shall refer to the bidder to whom the contract is awarded;

2.4 The term "Contracting Officer" designates the official executing this invitation for bids on behalf of the NATO Headquarters Maritime Allied Command (HQ MARCOM);

2.5 The term "Contracting Officer's Technical Representative" (COTR) designates the staff element that has the authority to coordinate, monitor and control Contractor's performance;

2.6 The term "HQ MARCOM" shall refer to the Headquarters Maritime Allied Command, located at Atlantic Building, Northwood HQ, Northwood, HA6 3HP, United Kingdom;

2.7 The term "ACO" shall refer to the Allied Command for Operations;

2.8 The term "NATO" shall refer to the North Atlantic Treaty Organisation;

2.9 The term "days" as used in this IFB shall, unless otherwise stated, be interpreted as meaning calendar days.

2.10 "Purchase Order" means the contractual document used by HQ MARCOM to order supplies and services.

3. ELIGIBILITY

3.1 This IFB is open to bids from firms that:

- Originate and are chartered/incorporated within any of the NATO-member nations (32)¹
- Maintain a professionally active facility (i.e.: office/factory/laboratory, etc) within NATO-member nations.

4. DURATION OF THE CONTRACT

4.1 The Contract(s) awarded through this IFB shall be effective upon award, for the period indicated in the Statement of Work

4.2 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.

4.3 A Covering Contract Letter and Purchase Order will be issued to the selected contractor upon award.

5. EXEMPTION FROM TAXES

5.1 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.

5.2 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

6.1 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;

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

6.2 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 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

7.1 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 Monday 2 Jun 2025 at 16:00 hours (GMT)

7.2 Bidders are advised that subsequent questions and/or requests for clarification included in a Bid shall neither be answered nor considered for evaluation. Except as provided above, all questions will be answered by the Contracting Officer in writing. 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.

7.3 Oral explanations or instructions shall not be binding unless confirmed in writing by the Contracting Officer.

7.4 The published answers issued by e-mail by the Contracting Officer shall be regarded as the authoritative interpretation of the IFB. Amendment to the language of the IFB included in the answers shall be incorporated by the bidder in his offer.

8. BID SUBMISSION / CLOSING DATE

8.1 Bids must be received not later than Monday 16 June 2025 at 16:00 hours (BST) as indicated in this IFB, or the authorised extension thereof. At that date and time the bidding shall be closed.

8.2 The whole bid, to include any submittals, shall be written in English.

8.3 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". The technical proposal MUST also include a completed copy of Annex A to the Statement of Work. ALL technical information pertinent to the "Price Proposal" must be included in the "Technical Proposal". If either part of the bid (i.e. Price or Technical) will have more than one attachment please mark clearly all/any attachments as either Price or Technical proposal.

8.4 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

Name: Helen Hale
E-mail: h.hale2@mc.nato.int

8.5 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

9.1 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 Monday 2 June 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

10.1 Bids submitted shall remain valid up to 90 days after bid closing date.

10.2 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;

10.3 HQ MARCOM will automatically consider a denial as a withdrawal of the bid.

11. COMPLIANCE

11.1 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.

11.2 Each bidder must include in their bid the Compliance statements in accordance with Enclosures 3, (part I) of this IFB. The Bidder shall list thereon, if applicable, all deviations from the General Provisions (Part II) and Technical (Part III) Requirements of the IFB.

11.3 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.

Failure to submit completed compliance statements may result in disqualification of the bid.

12. CURRENCY

12.1 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.

12.2 The Contract's value will be expressed in GBP. All payments will be made in GBP.

13. PRICING BASIS

13.1 All Team Leader and SME prices shall be expressed as fixed and firm per day prices and will include all associated costs for delivery at Northwood HQ, Northwood, HA6 3HP, United Kingdom. All per diem and travel costs shall be fully inclusive, and be on a reimbursable basis, subject to a cost ceiling.

13.2 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.

14. CONTENTS OF BID

14.1 The Bid shall address and respond to all the requirements requested in this IFB and Include completed Enclosures and Annexes where required. The Bid shall describe, as fully and clearly as possible, how the bidder intends to meet the requirements and satisfy the terms and conditions of the prospective contract.

14.2 Indications of compliance as per the Compliance Statement (Enclosure 3) shall not absolve bidders from demonstrating in full, their understanding of the requirements and the means by which they intend to meet them. For the determination of compliance, the detailed comments in the Bid form the decisive basis.

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 SOR (Enclosure 3 hereto);**
- (4) References of current or recent contracts (Enclosure 4 hereto);**
- (5) Provision of technical documents: Any appropriate technical information to determine whether Bidder's proposal complies with all the requirements of the IFB. It is also mandatory to submit Annex A to the SOW, completed fully with all technical details requested.**
- (6) Price Proposal: The Price Proposal shall be submitted in POUND STERLING (GBP) currency on the attached PRICING SCHEDULE (Enclosure 5 hereto).**

IMPORTANT: Bidders shall note that partial bidding is not authorised and the bid must meet the full requirements of the SOW.

15. BID EVALUATION

15.1 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.

15.2 HQ MARCOM is not responsible for seeking any information that is not easily identified and available in the bid package.

15.3 Each BID will be evaluated individually. Separate bids will not have any influence on the evaluation of the other. 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 responsibility² to make sure that there are adequate resources to perform the contract and is able to comply with the required/proposed delivery or performance schedule. The technical evaluation will include the review of Annex A, as completed by the bidder.

15.4 For those bids deemed to PASS the technical evaluation, the second stage will be the Price Evaluation. 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 of the SOW and total of cost ceilings for all travel and per diem will be the price considered. This is the price contained in box 6H (highlighted yellow) in the Pricing Table in the Pricing Schedule (Enclosure 5)

15.5 If it is discovered, during either the Technical or Price evaluation, that the Bidder has taken exception to the Terms and Conditions of the Prospective Contract, or has qualified and/or otherwise conditioned his offer on a modification or alteration of the Terms and Conditions or the language of the Statement of Requirement, the Bidder may be determined to have submitted a non-compliant bid.

15.6 During the evaluation, the Contracting Officer may request clarification of the Bid from the Bidder and the Bidder shall provide sufficient detailed information in connection with such requests as to permit the Contracting Officer to make a final determination based upon the facts. The purpose of such clarifications will be to resolve ambiguities in the bid and to permit the Bidder to state his intentions regarding certain statements contained therein. The Bidder is not permitted any cardinal alteration of the bid regarding technical matters and shall not make any change to its Price Proposal at any time.

16. SELECTED BID AND AWARD OF CONTRACT

16.1 HQ MARCOM will select 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.

² 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.

16.2 Final award of contract will be subject to the selected Bidder providing the following:

- (1)** Signed HQ MARCOM Liability Declaration
- (2)** Signed HQ MARCOM Certificate of Authorisation to perform.
- (3)** Signed HQ MARCOM Certificate of Absence of Claim or Litigation

Note: Document(s) (1)-(3) will be provided by HQ MARCOM pre award of contract.

- (4)** Certificate from insurer stating bidder's fulfilment of suitable civil liability insurance (with indication of liabilities covered and limits and proof of payment).
- (5)** Copies of valid security clearances for personnel provided in connection with this contract

16.3 Notwithstanding the provision of 16.1 above, HQ MARCOM reserves the right, at any time, to reject any or all bids and/or to not proceed with any award of contract as a result of this IFB.

17. DEBRIEFING

17.1 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.

18. RIGHT OF PROTEST

18.1 An unsuccessful bidder may submit a written protest within 5 working days of the notification of the decision to award. 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.

19. RIGHT OF APPEAL:

19.1 An appeal may be submitted in writing within 5 working days of receiving the decision to the first level of protest as per the subparagraphs 18.1 here above, for review by the HQ MARCOM Financial Controller. 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.

20. COMMUNICATIONS

20.1 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;

20.2 POINTS OF CONTACT:

LCDR Anthony Castleberry
Branch Head Purchasing and Contracting
Email address: a.castleberry@mc.nato.int

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

21. ZERO TOLERANCE POLICY

21.1 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).

21.2 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.

21.3 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.

21.4 If the Contracting Officer established that the provisions stated in paragraphs 21.1, 21.2 and 21.3 above have been disregarded; the bidder(s) may be removed from any NATO source list following consultation with SHAPE and the relevant national authorities.

NATO UNCLASSIFIED

**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)**
- ☐ **Annex A to SOW (Part III) – to be completed as part of bid technical submission**

NATO UNCLASSIFIED

ENCLOSURE 2 TO PART 1 – HQ MARCOM CONTRACTOR/SUPPLIER REGISTRATION INFORMATION

Contractor/Supplier Registration Information

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

1) DUNS Number³:

2) Tax ID⁴* (* 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.

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

⁴ VAT number mandatory for EU firms and independent contractors.

NATO UNCLASSIFIED

ENCLOSURE 3 TO PART 1-
COMPLIANCE STATEMENT⁵

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-BST-25-01 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:

[illegible]

Date:

Signature:

Name and Title:.....

Company:

5 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.

NATO UNCLASSIFIED

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 requirement⁶, 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.	

⁶ 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.

NATO UNCLASSIFIED
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.
 - b. Per diem and travel costs will be treated as cost ceilings not to be exceeded.
 - c. 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.
 - d. An event is as defined at Paragraph 4 Period of Performance of the SoW, with five separate events defined.
 - e. All prices should be quoted in GBP.
 - f. All prices should be exclusive of VAT.
 - g. 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.
 - h. The proposal should include the details of the Team Leader and proposed SMEs to meet the SoW requirements.
 - i. Any changes to the proposal, which lead to a change of price requires the prior approval of the HQ MARCOM Contracting Officer.
 - j. Where possible, the Provider should identify cost savings, provided that they will not impact on the quality of the service provision.

NATO UNCLASSIFIED

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:

NATO UNCLASSIFIED

Pricing Table

		A.	B.	C.	D.	E	F	G	H
	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	Number of days of subsistence	Daily subsistence amount	Cost ceiling total travel expenses	Total costs per SME
1	Team Leader								
2	SME								
3	SME								
4	SME								
5	SME								
6	Totals								

**IFB-HQ MARCOM- Battle Staff Training (BST)-
2025-01**

**Provision of Exercise Support Services
For Academics, Key Leader Training and Battle Staff Training, HQ MARCOM
(DYNAMIC BONUS 25-2)
For Mentoring Support (STEADFAST DUAL 25)**

PART II GENERAL PROVISIONS

1. **DEFINITIONS**

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

- a. **"MARCOM"** means the Allied Maritime Command
- b. **"North Atlantic Treaty Organisation"** is hereafter referred to as NATO;
- c. **"Contracting Officer"** means the person executing and managing the contract on behalf of MARCOM. Only duly designated Contracting Officers have the authority to obligate MARCOM;
- d. **"Contracting Officer's Technical Representative"** or **"COTR"** means a person appointed by the Contracting Officer for the purpose of determining compliance with the technical requirements of the contract;
- e. **"Contractor"** means the entity (firm or person) to whom the contract is awarded and on whose behalf duly authorised persons shall execute it;
- f. **"Purchase Order"** means the contractual document used by MARCOM to order supplies and services;
- g. **"Days"** shall be interpreted as meaning calendar days.

2. **APPLICABLE LAW AND REGULATIONS**

2.1. Except as otherwise provided in the contract, the contract shall be governed, interpreted and construed in accordance with the Civil Law of the England and Wales;

2.2. When performing at NATO Installations the Contractor and its personnel (including also the Sub-contractor's personnel, if any) shall comply with all applicable laws of the host nation and all relevant official NATO and MARCOM/local installation Directives, including ships.

2.3. Both parties are under duty of good faith. The contract includes not only the specific terms, but also law and customary practice applicable in the place where the contract is to be carried out and to the Type of Trade to which the contract relates.

2.4 Unless advised otherwise, the Contractor will be responsible for organising all activities and services, including but not limited to transport and accommodation, required for their personnel to fulfill the requirements of the specification.

3. **AUTHORITY**

Any modifications, including changes, additions or deletions and instructions under the contract shall not be binding unless issued in writing by the Contracting Officer.

4. **CONTRACTOR STATUS**

The Contractor's status shall be that of an independent Contractor and it is expressly understood that neither the Contractor (nor its personnel) nor Sub-contractors shall be considered in any respect as being employees, servants or agents of NATO.

5. **CONTRACTOR RESPONSIBILITY**

The Contractor shall be responsible for the execution of all terms of the contract. It may not delegate its rights or transfer its obligations without the prior permission of the Contracting Officer.

6. SECURITY

6.1. The Contractor shall comply with all security requirements prescribed by MARCOM and the National Security Authority or designated security Agency of the location(s) of NATO installations (including ships) where the contract is executed.

6.2. The Contractor is responsible for the safeguarding of NATO classified information or any other information labelled sensitive, entrusted to it or generated by it in connection with the performance of the Contract. It undertakes not to pass on to anyone outside its staff information provided for the performance of the Contract, or any information it may become privy to. It undertakes not to pass on such information or to use it for any purpose whatsoever. Similarly, all Contractor personnel employed at MARCOM installations shall be required not to disclose any information they may become aware of in the performance of the contract;

6.3. Any known or suspected breaches of security or other matters of security significance shall be immediately reported by the Contractor to the Contracting Officer and to the MARCOM Security Officer;

6.4. The Contractor ensures that its employees are informed that they may be searched when they enter or leave NATO premises or associated assets;

6.5. The Contractor shall place the Sub-contractor, if any, under security obligations no less stringent than those applied to its own Contract;

6.6. If requested, the Contractor undertakes to provide MARCOM Security Officer/COTR with an information sheet on all its employees, before they take up their duties, using the form provided by that Officer;

6.7. The Contractor accepts to terminate immediately the duties under this contract of any employee whose presence is deemed undesirable by MARCOM on the same day that such notification is given by the Contracting Officer or MARCOM Security Officer, without MARCOM being required to state the reasons. Furthermore, in no case may MARCOM be held responsible for the consequences of such a decision.

7. ACCESS CONTROL

Before commencing work on NATO locations or supporting assets, the Contractor's personnel may be required to be in possession of access cards. The COTR and the contractor should plan to obtain these.

8. INSURANCE

8.1. The Contractor agrees to procure and maintain, without any cost to MARCOM, any workmen's compensation, employees' liability or other type of insurance required by Law or other NATO countries, as applicable;

NATO UNCLASSIFIED

8.2. The Contractor agrees to procure and maintain, without any cost to MARCOM, a suitable civil liability insurance to cover, on the one hand, damage which could be caused e.g. by fire, and on the other hand, injury to persons.

9. HEALTH, SAFETY AND ACCIDENT PREVENTION

9.1. The Contractor shall comply with the laws and regulations of the NATO countries where the contract will be executed. on safety at work and with the Regulations in force at the workplace(s)/location(s) with regard to health and accident prevention, safety and hygiene;

9.2. If the Contracting Officer or the COTR notifies the Contractor in writing of any non-compliance in the performance of the contract, with regard to safety and health rules and requirements prescribed by applicable national or local laws, ordinances and codes, and the Contractor fails to take immediate corrective action, then the Contracting Officer may order the Contractor to stop all or part of the work until satisfactory corrective action has been taken. Such an order to stop work shall not entitle the Contractor to an adjustment of the Contract price or other reimbursement for resulting increased costs or losses;

10. PREFERRED CUSTOMER

10.1. The Contractor warrants that the prices set forth in the contract are as favourable as those extended to any Government, Agency, Company, Organisation or individual purchasing like quantities of goods and/or services covered by the Contract under similar conditions. In the event that prior to termination of the contract the Contractor offers any of such goods and/or services in substantially similar quantities to any customer at prices lower than those set forth herein, the Contractor shall so notify MARCOM and the prices of such goods and/or services shall be correspondingly reduced by an amendment to the contract;

11. CHANGES

11.1. Any changes, modifications, additions or deletions and instructions under the contract shall not be binding unless issued in writing as formal amendments by the Contracting Officer and signed by both Parties in the same manner as the contract;

11.2. The Contracting Officer may at any time, by a written order, make changes, within the general scope of this contract;

11.3. If any such changes cause an increase or decrease in the cost of, or in the time required for the performance of any part of the work under the contract, an equitable adjustment shall be made to the contract price. Then the Contract shall be modified in writing accordingly;

11.4. Failure to agree to any adjustment shall be a dispute concerning a question of fact within the meaning of the Clause titled "DISPUTES" herein. However, nothing in this clause shall excuse the Contractor from proceeding with the Contract as changed.

12. CONTRACTOR'S NOTICE OF DELAY

12.1. In the event the Contractor encounters difficulty in meeting performance requirements, or when it anticipates difficulty in complying with the Contract delivery schedule or date, it shall immediately notify the Contracting Officer in writing, giving pertinent details. This data shall be deemed to be information only in character and this provision shall not be construed as a waiver by MARCOM of any delivery schedule or date, or of any rights or remedies provided by law or under the contract;

12.2. When such delay has been caused by the occurrence of any cause constituting Force Majeure and as soon as possible, the Contractor shall give notice and full particulars in writing to the Contracting Officer of such occurrence, as well as its claim for a reasonable extension in time for completion of its obligations under the contract. If the Contractor, in despite of that extension, remains unable by reason of Force Majeure to perform its obligations and meet its responsibilities under the contract, MARCOM has the right to suspend or terminate the contract on the same terms and conditions as are provided for in the clause titled "DEFAULT" herein;

13. DISPUTES

13.1. 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 their decisions to writing, and furnish a copy thereof to the Contractor.

13.2. 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.

13.3. 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 for legal proceedings. All disputes and claims arising out of or related to this contract shall be subject to the exclusive jurisdiction of the English Courts to which the parties irrevocably submit. The aforementioned court may utilize alternative dispute resolution where agreed between the parties. Otherwise the aforementioned court shall follow a formal litigation process in accordance with the law of the England and Wales.

13.4. In all cases, the Contractor will proceed diligently with the performance of the contract and in accordance with the decisions of the Headquarters' representatives.

14. TERMINATION FOR DEFAULT

14.1 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;

The Contracting Authority may by written Notice of Default to the Contractor terminate the whole or any part of the contract

22.

14.2. 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.

15. TERMINATION FOR CONVENIENCE

NATO UNCLASSIFIED

15.1 The performance of this contract may be terminated whenever the Contracting Authority shall determine that such action is required. The Contractor will be notified of the termination in writing (e-mail transmission permitted) as soon as practical. All service delivery should cease upon notification of termination. The Contractor will immediately submit any outstanding invoices for supplies or services delivered to the date of termination, subject to the provisions of Purchase Order financial ceiling.

16. SAFETY TESTS AND INSPECTIONS

16.1. Unless otherwise specifically provided for in the contract, 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 purposes intended. All workmanship shall be first class.

16.2. In case any supplies are defective in material or workmanship or otherwise not in conformity with the requirements of this contract, MARCOM shall have the right either to reject them (with or without instructions as to their disposition) or to require their correction or to accept them against reduction in price which is equitable under the circumstances.

16.3. In case of a disagreement between the COTR and the contractor concerning the conformity of materials and equipment, tests may be called for by MARCOM, whereby in the event of failure of the item under test, all costs associated with the tests costs shall be at the contractor's expense.

16.4. The inspection and test by MARCOM of any supplies does not relieve the Contractor from any responsibility regarding defects or other failures to meet the contract requirements which may be discovered prior to acceptance.

16.5. It is the Contractor's responsibility to obtain, at no additional cost to MARCOM, the suitable official certificates for all parts, equipment and installations that before putting into use require tests or inspections by formally recognised agencies or firms. The certificates, together with the validated test reports, shall be available and submitted to the COTR prior to the start of the acceptance testing by MARCOM. In case of a disagreement between the COTR and the contractor concerning the conformity of materials and equipment, tests may be called for by MARCOM, whereby in the event of failure of the item under test, all costs associated with the tests costs shall be at the contractor's expense.

17. VARIATION IN QUANTITY

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

18. ACCEPTANCE

18.1. Acceptance is the action by which MARCOM acknowledges that the Contractor has fully demonstrated that the deliveries (both goods and services) are complete and operational.

18.2. Acceptance or rejection of supplies or works shall be made as promptly as practicable after delivery or completion, except as otherwise provided in the contract. Any damage will be noted on delivery, dated and signed.

18.3. Acceptance will occur when the all requirements, as defined in the specification, have been met:

18.3.1. Provisional Acceptance:

Provisional Acceptance will occur when discrepancies exist. In this case:

- The Contracting Officer and the Contractor shall agree and establish a list of discrepancies with corresponding clearing dates.
- MARCOM reserves the right to withhold from payment an amount commensurate with the importance of these, until all discrepancies are solved.

18.3.2. Final Acceptance:

Final Acceptance will occur when either no discrepancies exist or the recorded discrepancies have been corrected. It shall be conclusive, except for latent defects, fraud, gross mistakes amounting to fraud, or otherwise stated in the Contract.

19. TITLE TO PROPERTY AND RISK OF LOSS

19.1. Unless this contract specifically provides for passage of title, title to property of the supplies covered by this contract shall remain with the Contractor.

19.2. Unless this contract specifically provides otherwise, risk of loss or of damage to supplies covered by this contract shall remain with the Contractor.

20. FORCE MAJEURE

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.

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.

NATO UNCLASSIFIED

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.

21. LIMITATION OF LIABILITY

21.1. 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.

21.2 The total liability of Contractor hereunder 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.

22. PAYMENT

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, or as advised otherwise by the HQ MARCOM Purchasing and Contracting Section.

23, TAXES AND DUTIES.

22.1. 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.

22.2. 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.

24. CORRUPTION AND ILLICIT GRATUITIES

24.1. The Contractor certifies that neither it nor its agents or representatives have offered or given any gratuity whatsoever to any MARCOM personnel, with a view to securing a contract or favourable treatment with regard to the award, modification or execution of the contract;

24.2 MARCOM may, by registered letter, terminate the contract without notice if it is found, after an investigation instituted by MARCOM, that gratuities (in the form of entertainment, gifts or others) were

NATO UNCLASSIFIED

offered or given by the Contractor to MARCOM personnel with respect to the award of the contract or to the taking of any decision regarding its execution.

25. RELEASE OF NEWS/INFORMATION

25.1. No news release (including photographs and films, public announcements, etc.) on any part of the subject matter of the contract shall be made by the Contractor without prior written approval by the Contracting Officer;

25.2 Furthermore the Contractor shall, in no other manner whatsoever use the name, emblem or official seal of NATO and/or MARCOM in connection with its business or otherwise.

26. INCONSISTENCY BETWEEN ENGLISH VERSION AND TRANSLATION OF CONTRACT

In the event of inconsistency between any terms of the contract and any translation thereof into another language, the English language meaning shall prevail.

27. CONTRACT ADMINISTRATION AND COMMUNICATIONS

27.1. The Contractor shall direct all inquiries, notices and communications regarding the contract to the Contracting Officer;

27.2. All inquiries, notices and communications between the Contractor and MARCOM shall be written in English and in all correspondence the Contract number shall be mentioned;

27.3 Any official discussion/negotiation between Contractor and Contracting Officers or Contracting Officer's Technical Representatives shall be recorded in Minutes which shall be signed by authorised representatives of both Contractor and MARCOM. All minutes are considered to be a summary record of discussions and specific actions to be undertaken by the parties as a result of meeting.

27.4. If, however, it is considered by either party that certain discussions and decisions fall outside the scope of the contract, then this fact should be recorded at the time and contract amendments will be necessary prior to any action. In this respect it is stated that any changes or instructions which are to be binding shall be given in writing only by the NATO Contracting Officer.

28. CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE

28.1 The **Contracting Officer Representative (COTR)** is authorized by this designation to take any and all action with respect to the following which could lawfully be taken by the Contracting Officer, except any action specifically prohibited herein i.e.:

Verify that the Contractor performs the technical requirements of the contract in accordance with the contract terms, conditions, and specifications by:

- Monitoring the Contractor's performance and notifying the Contracting Officer of deficiencies observed during surveillance;
- Recording and reporting to the Contracting Officer incidents of faulty or non-conforming work, delays, or problems;
- Performing, or causing to be performed, necessary inspections and verifying that the Contractor has corrected all deficiencies;

NATO UNCLASSIFIED

- Continuously monitor and evaluate invoices for accuracy related to direct variable services costs and variable service costs.
 - At the end of each evaluation period and at the completion of every contract, submitting to the Contracting Officer the Contractor's Performance Evaluation report regarding services rendered under this contract to assess contractor's performance;
 - Performing acceptance of services provided under this contract.
- a. Maintain liaison and direct communication with the Contractor. Written communications with the Contractor and other documents pertaining to the contract shall be signed as "Contracting Officer's Representative" with a copy furnished to the Contracting Officer;
 - b. Coordinate site entry for Contractor personnel.

The **Contracting Officer Technical Representative (COTR)** is not authorised:

- c. To award, agree to, or sign any contract (including delivery orders) or modifications thereto, or in any way to obligate the payment of money
- d. To take any action that may impact on the contract or delivery schedules, funds, or scope. Only the Contracting Officer shall make these

The Contracting Officer's Technical Representative may not delegate their COTR authority. The designation as a COTR shall remain in effect through the life of the contract, unless revoked/terminated sooner by the Contracting Officer.

NATO UNCLASSIFIED

IFB-HQMARCOT-25-01
Provision of Exercise Support Services
For Academics, Key Leader Training and Battle Staff Training, HQ MARCOM
(DYNAMIC BONUS 25-2)
For Mentoring Support (STEADFAST DUAL)

PART III STATEMENT OF WORK

**Provision of Exercise Support Services
For
HQ MARCOM
Academics, Key Leader Training and Battle Staff Training
(DYNAMIC BONUS 25-2)
Mentoring for exercise (STEADFAST DUAL)**

Dated 11 April 2025



STATEMENT OF WORK

NATO UNCLASSIFIED

STATEMENT OF WORK

<u>1.</u>	<u>BACKGROUND INFORMATION</u>	4
<u>2.</u>	<u>SCOPE OF WORK</u>	4
<u>3.</u>	<u>ASSUMPTIONS</u>	8
<u>4.</u>	<u>PERIOD OF PERFORMANCE</u>	9
<u>5.</u>	<u>LOCATION OF SERVICE DELIVERY</u>	10
<u>6.</u>	<u>TECHNICAL CRITERIA</u>	10
<u>7.</u>	<u>QUALITY CONTROL AND QUALITY ASSURANCE</u>	12
<u>8.</u>	<u>PHYSICAL SECURITY</u>	12
<u>9.</u>	<u>LATITUDE AND DISCRETION</u>	12
<u>Annex A Requirements Matrix</u>		1

1. BACKGROUND INFORMATION

1.1 This Statement of Work (SOW) outlines the requirements for Exercise DYNAMIC BONUS 25-2 (DYBS25-2) and STEADFAST DUEL (STDU25) 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 (ACA), Key Leader Training (KLT) up to DCOS level and Battle Staff Training (BST) in preparation of exercise STDU25.

1.2 The Officer of Primary Responsible (OPR) for this requirement will be from the N7 (training) division and they will act as the primary interface during execution of this requirement.

1.3 All work is in the context of COM MARCOM's intent to deliver a maritime Warfighting HQ that is capable of dynamic, resilient and operational-level command, control and advice.

2. SCOPE OF WORK

2.1 Introduction

(1) The requested Exercise DYBS25-2 Support Services is for the Academics phase, KLT and the development and execution of the BST in advance of STDU25. The support is also requested for the execution of STDU25.

(2) Academics, KLT and BST will build the foundation as part of the roadmap towards MARCOM's readiness for the STDU25 execution.

(3) STDU25 is a SHAPE scheduled operational and tactical level Command Post Exercise/ Computer Assisted Exercise (CPX/CAX) 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 Central Europe and the Baltic Sea region. STDU25 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) Centre, Subordinate Strategic Plans (SSPs), Supported/ Supporting Interrelationship (SSI) and the synchronization of national defense plans with NATO.

(4) During STDU25 MARCOM HQ will support 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 Centre (JOA C) as Secondary Training Audience (STA) and furthermore as MCC Robust Response Cell (R-RC) in JOA NW and 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 STDU25.

(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 STDU25.

NATO UNCLASSIFIED

(7) The Training Audience (TA) for the BST is the MARCOM DCOS level and staff, except those personnel who are mainly involved in real life issues. The DCOS level involvement will be determined during the Planning Process post award.

(8) The Contractor will deliver ACA and KLT (06 - 10 Oct 25) leading to the BST (13 - 17 Oct 25) of DYBS25-2. During the BST execution phase, MARCOM will resolve selected operational maritime dilemmas based on provider driven vignettes. This is in order to prepare and improve the HQ Decision Making Process (DMP) through exposure to multi-facetted operational challenges and to prepare for STDU25.

(9) The DYBS25-2 BST Phase will use planning products and documentation available for the STDU25 CPX. This will include the Crisis Situational Updates (CSUs), the Road to Crisis, the STDU25 JCO/MCO and other appropriate scenario documents. The departure point of the STDU25 BST will see MARCOM in a scenario which requires a tailored NATO maritime response to an emerging crisis. This means that the content, context, dilemmas, and operational setting will be based on existing operational context made for the STDU25 CPX. As such, no unique BST scenario setting will be developed or used. All products required for the BST are to be produced by the Contractor and must lead to STARTEX STDU25.

(10) The main objective of the ACA and BST Phases is to prepare MARCOM staff in order to achieve optimal performance during the execution phase of STDU25.

(11) MARCOM has limited capacity to design, develop and deliver the ACA and BST. The Contractor will be responsible for the planning, cross HQ coordination, materials, staff work and delivery of the ACA and BST phases. This external support can be considered as an important step to get MARCOM ready for the upcoming certification in 2026. Thus, external support is required to support and facilitate this training as well as to analyse the execution of STDU25.

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

(12) Prepare HQ MARCOM staff in line with agreed and approved STDU25 TOs.

(13) Ensure that Key Leaders and staff understand their roles and responsibilities within the MARCOM decision-making process (DMP).

(14) Improve the understanding of MARCOM Key Leaders and staff contributions to the operational level DMP.

(15) Facilitate the integration of newcomers into HQ MARCOM BR and DMP.

(16) Improve information management and dissemination, risk assessment and joint coordination in a MDO environment.

(17) Improve processes, procedures and products of boards and working groups (WGs), and the interaction between boards and WGs at the different levels.

(18) Execute and improve MARCOMs BR. Adapt the BR to enable Joint interaction with SHAPE BR and other Commands and Entities.

(19) Familiarise, refine and practice SOPs and SOIs.

2.3 **MARCOM BST DYBS25-2 Delivery**

(20) The MARCOM BST will be based on the STDU25 360 degree multi domain 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.

(21) MARCOM DYBS25-2 delivery will consist of tailored and consecutive training for key staff processes and concepts:

Block A - Academic / Key Leader Training programme (ACA / KLT) 06 – 10 Oct 2025

Block B - Battle-Rhythm and Battle Staff training (BST) activity 13 -17 Oct 2025

Block C - STDU25 EXERCISE 20 – 29 Oct 2025

as follows:

(a) **Block A (Academics and KLT) 06 – 10 Oct 2025**

DYBS25-2 ACA & KLT	MON 6 Oct 25	TUE 7 Oct 25	WED 8 Oct 25	THU 9 Oct 25	FRI 10 Oct 25
MARCOM	ACA STDU25	BST ACA			Hands on Trg
Company	Travel	ACA/KLT Deliver targeted & tailored training using Team Leader and SMEs as appropriate & introduction second week			No support req.

The purpose of this package is to set the conditions to be able to conduct the BST and ensure common understanding across MARCOM 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.

- I. ACA/KLT 07-09 Oct 2025. The majority of the ACA related to the scenario and BR will be delivered by HQ MARCOM staff SMEs with some support from the Provider Team Leader and staff SMEs. The focus for the targeted and tailored training of the ACA/KLT lies in particular on Targeting, Operations Assessment, Synchronization and C2 as well as Logistic/Enablement. Overall, the ACA will be focused on improving the knowledge of the following key topics in an Article 5 context:
 1. Joint Targeting and related Intel in a Multi Domain Operation environment
 2. Operations Assessment and Risk management.
 3. Joint Planning, Coordination and Synchronization.
 4. Logistics/Enablement.
 5. Situational Awareness.
 6. Interaction of WGs and Boards (Battle Rhythm).
- II. 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 the previously mentioned five focus topics.
- III. KLT (DCOS level). The KLT phase will be delivered by a combination of the Provider Team Leader and where required Provider staff SMEs and can be supported by MARCOM HQ staff SMEs. In addition to some ACA topics above,

NATO UNCLASSIFIED

the following topic should be considered for the KLT: Flag Officers advice, in support to the DMP (JFC/SHAPE). The specific details of the ACA and KLT programme support will be agreed between the MARCOM N7 and the Provider post award. The KLT will be a maximum of approximately 8 hours in timeframe 7 - 9 Oct 2025. The exact timeframe depends will be specified post award.

(b) Block B (Battle Staff Training) 13 -17 Oct 2025

DYBS25-2 BST	Mon 13 Oct 25	TUE 14 Oct 25	WED 15 Oct 25	THU 16 Oct 25	FRI 17 Oct 25
MARCOM	MARCOM BR at RL3				STDU25 Situation Update
Company	Vignette based challenges to train and stress MARCOM BR / WG / Boards and to advise and assist them.				No support req.

Based on MARCOM STDU25 BR and the exercise scenario in the maritime domain, the Provider will prepare and deliver a tailored vignette package to train the WG's and Boards in their contribution to the DMP. This phase will finish with Provider facilitated Feedback that provides areas to improve upon ahead of STDU25.

- I. MARCOM HQ BR. DOM will prepare and deliver MARCOM STDU25 BR. The BR will be conducted over 4 days to include the key Boards and WGs that are required to support the DMP and the joint coordination process in support of the respective Joint Task Force (JTF) HQ. Specific focus areas during the week may be facilitated with lectures and supported by tailored training efforts across functional areas and prioritised boards and WGs. These are to be agreed between MARCOM N7 and the Provider.
- II. The Provider will prepare and deliver a tailored vignette package according to the BR and assessment cycle using a combination of STDU25 scenario inputs and training support.
- III. DYBS25-2 will use planning products and documentation available for the STDU25 CPX. This will include the JCO/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 maritime response to an emerging crisis.
- IV. The provider must take into account that the implementation of the BST serves to prepare potentially inexperienced HQ MARCOM staff for the preparation and execution of the STDU25.
- V. Success of the BST is defined as having:
 - (i) Sufficiently integrated newcomers able to effectively contribute to MARCOM's BR and DMP and ready to support/contribute to the respective JHQ.
 - (ii) Achieved cognitive alignment across the HQ.
 - (iii) Regained collective capabilities as a Warfighting HQ able to perform the tasks as CFMCC, MTCC and three MCC's ready to commence with the STDU25 CPX phase.

(c) Block C STDU25 EXERCISE 20 – 29 Oct 2025

NATO UNCLASSIFIED

STDU25	Mon 20 Oct	TUE 21 Oct	WED 22 Oct	THU 23 Oct	FRI 24 Oct	SAT 25 Oct	SUN 26 Oct	MON 27 Oct	TUE 28 Oct	WED 29 Oct
MARCOM	STDU25 Execution									
Company	Observe / Assess / Mentoring (Feedback on BR / WG / Products)								AAR / D&G	

- I. The provider is requested to provide the Team Leader and three SMEs to observe, assess and mentor the MARCOM staff for the execution phase of STDU25. 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 STDU25.
- II. The provider SMEs should provide feedback to the performance of the WGs on a regular basis in order to improve their performance throughout the exercise. An appropriate way to address this feedback will be discussed and agreed with MARCOM N7 post award.
- III. 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 **NET 04 Jul 2025** 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.
- d. MARCOM N7 will ensure the Provider has access to the Regional Plans (RPs), the Subordinate Strategic Plans (SSP) and the MARDOM OPLAN 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

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: Post award (1 day) earliest 23 Jun 2025. Required: Team Leader plus 1 SME (SME provisional). Location HQ MARCOM HQ.
- (2) Contractor Team Read-In on NATO SECRET system. Specific date post award earliest 07 Jul 2025 (3 days). Required: Team Leader and all SMEs. Location: TBD. (OPLANS, Joint Co-ordination Orders, Maritime Coordination Orders, and relevant MARCOM SOPs. A detailed list of documents will be provided post contract award) With all this knowledge and the products, the provider should be able to create vignettes to train and challenge MARCOM's Battle Staff.
- (3) Vignette development Workshop. Three (3) days in timeframe 14 – 25 July 2025. Required: Team Leader and all SMEs. Location: MARCOM HQ. Development of vignettes in close coordination with MARCOM SME's if required.

Execution Phase:

- (4) MARCOM BST DYBS25-2 Delivery: 07-16 Oct 2025 (total: 7 working days).
Working day is 9 hours (provisionally 08:00-17:00)
 - i. 07 – 09 Oct: Deliver targeted and tailored training on Targeting, Operations Assessment, Synchronization and C2 as well as Logistic/Enablement in a Multi Domain Operation environment.
 - ii. 13 – 16 Oct: Provide and execute tailored vignette based training in the second week of DYBS25-2.
 - **Team Leader:** 07-16 Oct 2025 (7 working days)
 - **All SMEs (5Px):** 07-16 Oct 2025 (7 working days)
 - **Location:** **HQ MARCOM.**

[Remark: No requirement for participation 10-12 October (Friday until Sunday)].

- (5) STDU25 Delivery: 20-29 Oct 2025 (total: 10 working days).
Working day is 12 hours (provisionally 07:00-19:00)

The provider should observe / evaluate / mentor and also give direct feedback on the BR, the WG performance and products. The team leader should give feedback and the impression gained to the Command Group in the last two days.

- **Team Leader:** 20-29 Oct (**10 Days**)
- **Three SME's** (Targeting, OPSA, Synchronization/C2): 20-27 October (**8 Days**).
- **Location:** **HQ MARCOM**

5. LOCATION OF SERVICE DELIVERY

5.1 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.

5.2 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.

VI. 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.

VII. 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's 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's 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

6.1 The Provider must meet all the required technical criteria and demonstrate the following:

- (1) Previous experience working with NATO Maritime Domain, Operational Level, Computer Assisted Exercises.
- (2) Experience conducting training at SHAPE or JFC level to include SHAPE's decision-making process (DMP) and maritime warfighting HQ role.
- (3) Have demonstrated expertise in the NATO Crisis Response System and its application at the NATO strategic and operational levels in an Article 5 context.
- (4) Knowledge of the 360-degree Multi-Domain Scenario that forms the basis for STDU25 and familiarity with the RPs, SSPs and MARDOM OPLAN.
- (5) Experience in the past 48 months in working with a Joint Command or Single Service Component operating as Component Commands (SCC) in a Joint operational context in a NATO Article 5 campaign at SJO+/MJO/MJO+ level, operating as an MTCC, CFMCC and MCC.
- (6) Experience in the past 48 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 a high level exercise scenario. Experience must include both MEL/MIL and/or

NATO UNCLASSIFIED

vignette driven training, KLT, Academics and mentoring support preferably throughout the delivery of the BST.

- (7) Experience with NATO Collective Training Events for Operations Assessment (OPSA).

6.2 The Provider's team must meet the following technical criteria:

- (1) Team leader. The provider's team must be led by a former Naval Flag Officer with a minimum of 20 years of military experience and NATO experience at the operational and tactical levels and who meets all the following technical criteria:

- (a) Have demonstrated recent experience (last 48 months) as a senior mentor / advisor on a NATO exercise or BST at the strategic or joint operational level.
- (b) Have demonstrated experience with NATO's new strategic DMP and battle-rhythm.
- (c) Have recent experience (last 48 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 during the required periods referred to in paragraph 4 and be exclusively dedicated to this task.

- (2) SMEs. The SME's working environment is in mainly the maritime domain, so the majority (three or more of the team) of the provider's team should also have a maritime background. The provider's team members (limited to 5 SME's) must include SMEs knowledge in the following areas: Joint Targeting, Intel, Operations Assessment, Joint Coordination/Synchronization and C2, Logistics/Enablement. The provider's team should 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 MEL/MIL or vignette or dilemma development process for a NATO strategic, operational or SSC level exercise (ALL).
- (c) Have demonstrated experience working in EXCON or vignette driven exercise/training in a NATO strategic or operational level exercise or BST in the past 48 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).

NATO UNCLASSIFIED

- (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 or vignette driven exercise/training. (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 Operations Assessment in support of strategic, or operational HQs or organisations. (Assessment SME)

The technical requirements are summarised in Annex A to this document.

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**

- 8.1 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).
- 8.2 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.
- 8.3 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.

NATO UNCLASSIFIED

Annex A: Summary Requirements Matrix

To be fully completed and submitted as part of a bid.

(Y – fulfilled / N – not fulfilled)

Requirements Matrix	
Provider Technical Criteria's (SoW page 9)	Company/Provider Name
6.a.(1) Previous experience working with NATO Maritime Domain, Operational Level, Computer Assisted Exercises.	
6.a.(2) Experience conducting training at SHAPE or JFC level to include SHAPE's decision-making process (DMP) and maritime warfighting HQ role.	
6.a.(3) Have demonstrated expertise in the NATO Crisis Response System and its application at the NATO strategic and operational levels in an Article 5 context.	
6.a.(4) Knowledge of the 360-degree Multi-Domain Scenario that forms the basis for STDU25 and familiarity with the RPs, SSPs and MARDOM OPLAN.	
6.a.(5). (5) Experience in the past 48 months in working with the Single Service Maritime Component operating as Component Commands (SCC) in a Joint operational context in a NATO Article 5 campaign at SJO+/MJO/MJO+ level, operating as an MTCC, CFMCC and MCC.	
6.a.(6) Experience in the past 48 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 a high level exercise scenario. Experience must include both MEL/MIL and/or vignette driven training, KLT, Academics and mentoring support preferably throughout the delivery of the BST.	
6.a.(7). (7) Experience with NATO Collective Training Events for Operations Assessment (OPSA).	

TEAM LEADER (TL) ASSESSMENT TECHNICAL CRITERIA (SOW/ Page 10)	TL Name
6.b.(1). The provider's team must be led by a former Naval Flag Officer with a minimum of 20 years of military experience and NATO experience at the operational and tactical levels.	
6.b.(1). (a). Have demonstrated recent experience (last 48 months) as a senior mentor/ advisor on a NATO exercise or BST at the strategic or joint operational level.	
6.b.(1). (b) Have demonstrated experience with NATO's new strategic DMP and battle-rhythm.	
6.b.(1). (c) Have recent experience (last 48 months) mentoring and training a JFC / SSC on the operational level DMP and battle rhythm and the joint synchronization process.	
6.b.(1). (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.	
6.b.(1). (e) Have demonstrated experience delivering KLT to senior leaders at the operational and SSC level.	
6.b.(1). (f). Holds a valid NATO SECRET Security clearance.	
6.b.(1). (g). Must be present for the periods outlined in Para 4	

NATO UNCLASSIFIED

TEAM SME MEMBERS ASSESSMENT TECHNICAL CRITERIA/ Additional Requirements (SOW/ Page 10/ 6B (2))	SME Name	SME Name	SME Name	SME Name	SME Name
The SME's with maritime background.					
(a) Have demonstrated experience operating at the strategic and/or operational level within NATO integrating SSCs. (ALL)					
(b) Have participated in the MEL/MIL or vignette or dilemma development process for a NATO strategic, operational or SSC level exercise (ALL).					
(c) Have demonstrated experience working in EXCON or vignette driven exercise/training in a NATO strategic or operational level exercise or BST in the past 48 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 or vignette driven exercise/training. (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 Operations Assessment in support of strategic, or operational HQs or organisations. (Assessment SME)					