

IFIB-ACT-SACT-22-132



NORTH ATLANTIC TREATY ORGANIZATION
HEADQUARTERS, SUPREME ALLIED COMMANDER TRANSFORMATION
7857 BLANDY ROAD, SUITE 100
NORFOLK, VIRGINIA 23551-2490

Description of Acquisition

Part 1 Bidding Instructions

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Amendment # 1

(All changes in red text)

This Enclosure is designed to assist the respective company provide HQ SACT with all necessary documents/information required. For clarification, please refer to Bidding instructions in part 1 of subject solicitation.

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PART 1 BIDDING INSTRUCTIONS

1. General

This is a Firm Fixed Price Level of Effort contract in accordance the General Terms and Conditions; **Contract Award is contingent upon funding availability; Partial bidding is not allowed.**

2. Classification

This IFIB is a NATO UNCLASSIFIED document.

3. Definitions

- (a) The “Prospective Bidder”, shall refer to the entity that has completed and returned the Enclosure of the transmittal letter of this IFIB, and has indicated thereon its intention without commitment, to participate in this IFIB.
- (b) The term “Bidder”, shall refer to the bidding entity that has completed a bid in response to this IFIB.
- (c) The term Contractor shall refer to the bidding entity to whom the contract is awarded.
- (d) The term “Contracting Officer” designates the official who executes this IFIB on behalf of HQ SACT.
- (e) “Contracting Officer`s Technical Representative” or “COTR” is the official who is appointed for the purpose of determining compliance of the successful bid, per the technical specifications.
- (f) The term “HQ SACT” shall refer to Supreme Headquarters Allied Command Transformation.
- (g) The term “ACT” shall refer to Allied Commander Transformation.
- (h) The term “NATO”, shall refer to the North Atlantic Treaty Organisation.
- (i) The term “days” as used in this IFIB shall, unless otherwise stated, be interpreted as meaning calendar days.
- (j) The term “Habitual Residence”, means HQ SACT, Norfolk, Virginia, VA 23511.

4. Eligibility

This IFIB is open to companies:

- (a) Established in a North Atlantic Treaty Organisation Alliance member nation.
- (b) Working in the required field of study and legally authorised to operate in the United States of America, at the time of bidding.
- (c) Has performed the desired past performance including size, cost and scope, as described in this IFIB.

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5. Duration of Contract

- (a) The contract awarded shall be effective upon date of award.
- (b) Period of Performance: Base Period is 1 January 2023 – 31 December 2023, plus four 12-month option periods: 1 January 2024 – 31 December 2024, 1 January 2025 – 31 December 2025, 1 January 2026 – 31 December 2026, 1 January 2027 – 31 December 2027.

6. Exemption of Taxes

In accordance with the agreements, (Article VIII of the Paris Protocol dated, 25 August 1952) goods and services under this contract are exempt from taxes, duties and similar charges.

7. Amendment or Cancellation

- (a) HQ SACT reserves the right to amend or delete any one or more of the terms, conditions or provisions of the IFIB prior to the date set for bid closing. A solicitation amendment or amendments shall announce such action.
- (b) HQ SACT reserves the right to cancel, at any time, this IFIB either partially or in its entirety. No legal liability on the part of HQ SACT shall be considered for recovery of costs in connection to bid preparation. All efforts undertaken by any bidder shall be done considering and accepting, that no costs shall be recovered from HQ SACT. If this IFIB is cancelled, bidders who submitted proposals shall be notified via email from BUDFIN P&C.

8. Bidder Clarifications

- (a) Prospective Bidders should seek clarification at their earliest convenience. Any explanation regarding the meaning or interpretation of this IFIB, terms, clause, provision or specifications, shall be requested in writing, from the Contracting Officer. The Contracting Officer must receive such requests for clarification no later than 10 calendar days prior to the bid closing date.
- (b) Information in response to all inquiries / requests for clarification to a prospective bidder shall be furnished to all prospective bidders at the following link: <http://www.act.nato.int/contracting> as a Question and Answer addendum. All such addendums and any necessary solicitation amendments shall be incorporated into this IFIB. Oral Interpretations shall not be binding.

9. Bid closing date

Bids shall be received at HQ SACT, Purchasing and Contracting Office, no later than **5 December 2022, 0900 hours, Eastern Standard Time, Norfolk, Virginia, USA**. No bids shall be accepted after this time and date.

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10. Bid Validity

Bids shall remain valid for a period of one hundred and twenty days (120) from the applicable closing date set forth within this IFIB. HQ SACT reserves the right to request an extension of validity. Bidder shall be entitled to either grant or deny this extension of validity; HQ SACT shall automatically consider a denial to extend the validity as a withdrawal of the bid.

11. Content of Proposal

The proposal shall consist of 2 separate single PDF documents (Technical/Price) sent via e-mail as per the instructions. No hard copy proposals are required or will be accepted. E-mailed PDF documents shall be received no later than **5 December 2022, 0900 hours, Eastern Standard Time, Norfolk, Virginia, USA.**

A table of contents for the entire proposal (Checklist provided as Enclosure #1), with:

- (a) The bidder's full name address, Point of Contacts, Telephone, Fax number and Internet site;
- (b) Compliance statement;
- (c) Provision of financial and technical volumes
- (d) Annex A
- (e) Past performance

12. Proposal Submission

- (a) Proposals shall be submitted in two separately e-mailed packages, one containing a single PDF document of the Technical volume and one containing a single PDF document of the Price volume. Multiple files that must be pieced together to form the technical proposal will be rejected. The e-mail subject and PDF files shall be clearly marked with the IFIB Solicitation reference number and indicate if it is the Technical or Price Volume.
- (b) Proposal packages must be received by the HQ SACT identified Contracting Officers prior to the 0900 deadline. Delays in receipt due to server processes either at the contractor's facility, HQ SACT or both do not constitute an acceptable delay to the deadline. Contractors should ensure there is sufficient time to transmit proposals and confirm receipt prior to the established deadline.
- (c) Price proposals shall be in U.S. Dollar currency. Contractor may request payment post award in alternate currency based on NATO published conversion rate for applicable year. Prices shall be on a Firm Fixed Price Basis and include any relevant discount schedule.

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- (d) It is the sole responsibility of the interested company to review any Q & A that may be issued in support of this solicitation, prior to bid submission at www.act.nato.int/contracting.
- (e) No oral bids or oral modifications or telephonic bids shall be considered.
- (f) It is the ultimate responsibility prior to submission that all proposal submissions are reviewed to ensure they meet the technical and administrative specifications and that offers meet the limitations and expressed conditions.

13. Late Proposals

- (a) It is solely the bidder's responsibility that every effort is made to ensure that the proposal reaches HQ SACT prior to the established closing date and time. Only if it can be unequivocally demonstrated that the late arrival of the bid package was the result of NATO staff negligence (mishandling) shall the bid be considered.

14. Bid Withdrawal

A bidder may withdraw their bid up to the date and time specified for bid closing. Such a withdrawal must be completed in writing or facsimile, with attention to the HQ SACT Contracting Officer.

15. Bid Evaluation

- (a) The evaluation of bids and determination as to the responsiveness and technical adequacy or technical compliance, of the products or services requested, shall be the responsibility of HQ SACT. Such determinations shall be consistent with the evaluation criteria specified in the IFIB. HQ SACT is not responsible for any content that is not clearly identified in any proposal package.
- (b) Due to the highly technical nature of this requirement, HQ SACT reserves the right conduct pre-award discussions with proposed key personnel to accurately assess identified technical competencies. Discussions will be limited to scope of this IFIB and the evaluation criteria identified in Annex A.
- (c) Proposals shall be evaluated and awarded based on best overall value to NATO. The following factors are considerations;
 - Successful administrative submission of bid packages and requested documents.
 - Compliance with mandatory criteria identified on Annex A (Compliant / Non-Compliant)
 - Technical factors / pricing factors rated the following: Technical / Price = 70/30.

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- Acceptance of HQ SACT General Terms and Conditions.

16. Proposal Clarifications

During the entire evaluation process HQ SACT reserves the right to discuss any bid with the order to clarify what is offered and interpretation of language within the bid, to resolve in potential areas of non-compliance.

17. Award

HQ SACT intends to award a firm fixed price contract(s) to the Offeror(s) whose proposal(s) represents the best overall value to NATO. Partial Awards are not authorized. HQ SACT will collect information from references provided by the Offeror in regard to its past performance. Contractors must provide authorization to contact references. HQ SACT reserves the right to negotiate minor deviations to the listed General Terms and Conditions to this IFIB.

18. Communications

All communication related to this IFIB, between a prospective bidder and HQ SACT shall only be through the nominated HQ SACT Contracting Officer. Designated contracting staff shall assist the HQ SACT Contracting Officer in the administrative process. There shall be no contact with other HQ SACT personnel in regards to this IFIB. Such adherence shall ensure Fair and Open Competition with equal consideration and competitive footing leverage to all interested parties.

19. Organizational Conflict of Interest

Organizational conflicts of interest may occur when factors create an actual or potential conflict of interest on an instant contract, or when the nature of the work performed on the instant contract creates an actual or potential conflict of interest on a future acquisition. In the latter case, some restrictions on future activities of the contractor may result.

Contractors must implement a program to monitor, detect, and mitigate/remediate organizational conflicts of interest. While Contracting Officers retain authority to approve mitigation or remediation measures once organizational conflicts of interest are identified, the primary burden of detecting, identifying and disclosing organizational conflicts of interest to the contracting officer and proposing suitable mitigation or remediation measures falls on the contractor.

The two underlying principles regarding organizational conflicts of interest are:
Preventing the existence of conflicting roles that might bias a contractor's judgment;
and Preventing unfair competitive advantage.

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An unfair competitive advantage exists where a contractor competing for award of any Federal contract possesses:

Proprietary information that was obtained from a NATO official, staff member, or NATO contractor without proper authorization; or

Information that is relevant to the contract but is not available to all competitors, where such information would assist that contractor in obtaining the contract. Contracting officers and potential bidders shall analyze planned acquisitions in order to:

Identify and evaluate potential organizational conflicts of interest as early in the acquisition process as possible; and

Avoid, neutralize, or mitigate significant potential conflicts before contract award, where possible, or post award when the organizational conflict of interest is not revealed prior to award.

The contracting officer shall award the contract to the apparent successful offeror unless a conflict of interest is determined to exist that cannot be avoided or mitigated. Before determining to withhold award based on conflict of interest considerations, the contracting officer shall notify the contractor, provide the reasons therefor, and allow the contractor a reasonable opportunity to respond. If the contracting officer finds that it is in the best interest of NATO to award the contract notwithstanding a conflict of interest, the Contracting Officer will issue a waiver and disclose the award and the existence of the organizational conflict of interest to the Financial Controller. The waiver request and decision shall be included in the contract file.

Obligations of the Parties.

When a Contractor or Prospective Contractor becomes aware of the existence or potential for an organizational conflict of interest, the Contractor is obligated to disclose the existence, nature, and supporting evidence of the conflict. Contractors or Prospective Contractors will be deemed to be aware of the existence or potential for an organizational conflict of interest when the Contractor or Prospective Contractor actually knows or reasonably should know of the existence of the actual or potential organizational conflict of interest.

If the Contracting Officer becomes reasonably aware that the award of a contract will restrict the contractor's eligibility for future contract work, the Contracting Officer will disclose this fact in writing to the Contractor prior to the award, where practicable, and will permit the Contractor or prospective Contractor 7 days to make an election regarding award, discontinuing performance, or submitting an OCI mitigation plan for the Contracting Officer's approval. The sufficiency of the OCI mitigation plan is in the

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Contracting Officer's sole discretion.

20. Point of Contact Information For Submission:

techproposal@act.nato.int – Technical Proposal Submission

priceproposal@act.nato.int – Price Proposal Submission

21. Point of Contact is:

LCDR Brandon Stewart, ACT Contracting Officer 757-747-3977;

Brandon.Stewart@act.nato.int

Mrs. Kellie Hagen, ACT Contracting Officer 757-747-4180;

Kellie.Hagen@act.nato.int

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Enclosure 1 (Proposal Content / Checklist)

PROPOSAL CONTENT / CHECKLIST

Table of Contents

- Bidder's name, address, POC, Contact numbers, email address.
- Compliance Statement.
- Past Performance (including References).
- List of Key Personnel.
- Technical Proposal.
- Price Proposal.

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ENCLOSURE 2

COMPLIANCE STATEMENT TO SEALED BID IFIB-ACT-SACT-22-132

It is hereby stated that our company has read and understands all documentation issued as part of IFIB-ACT-SACT-22-132. Our company proposal submitted in response to the referenced solicitation is fully compliant with the provisions of IFIB-ACT-SACT-22-132 and the intended contract with the following exception(s); such exemptions are considered non-substantial to the HQ SACT solicitation provisions issued.

| <u>Clause</u> | <u>Description of Minor Deviation.</u> |
|---------------|--|
| ----- | ----- |
| ----- | ----- |
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| ----- | ----- |
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| ----- | ----- |
| ----- | ----- |
| ----- | ----- |
| ----- | ----- |

If applicable, add another

page) Company: _____

Signature: _

Name & Title: _____

Date: _

Company Bid Reference: _

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Bidder's proposal must be based on full compliance with the terms, conditions and requirements of the IFIB and all future clarifications and/or amendments. The bidder may 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 explanation furnished, the detailed evidence/comments shall take precedence/priority for the actual determination of compliance. Minor or non-substantial deviations may be accepted. Substantial changes shall be considered non-responsive.

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Enclosure 3

PAST PERFORMANCE INFORMATION FORM

- (a) Contracting Agency:
- (b) Contract No:
- (c) Type of Contract (Firm Fixed Price, IDIQ, Requirements):
- (d) Title of Contract:
- (e) Description of Work Performance and Relevance to Current Acquisition
(Type of facility, capacity, estimated patronage, summary of staff used):
- (f) Contract Dollar Amount:
- (g) Period of Performance:
- (h) Name, Address, Fax and Telephone No. of Reference:
- (i) Indicate Whether Reference Acted as Prime or Sub-contractor:
- (j) Comments regarding compliance with contract terms and conditions:
- (k) Complete Contact Information for client:
- (l) Permission to contact client for reference:

Yes/ No Name/Signature of Authorized

Company Official

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Enclosure 4

IFIB-ACT-SACT-22-132 SEALED BID PRICE PROPOSAL

COMPANY NAME: ***ABC, Inc***

ADDRESS: ***Street,***

CITY, POST CODE

TO: Chairman of Supreme Allied
Commander Transformation, (HQ
SACT)Contracts Award Committee.
ATTN: LCDR Brandon Stewart
7857 Blandy Road, Suite 100
Norfolk, VA 23551

Please verify and acknowledge propriety of above, by duly
completing signatures below. Authorizing Company Official:

Printed _____ Name: _____
Position: _____ Title: _____

Authorizing Company (Signature): _____, Date: _____.

Company name Witness Official:

Printed _____ Name: _____
Position: _____ Title: _____

Witness Signature: _____

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Enclosure 5 (Mandatory Price Proposal Format)

SEALED BID PRICE PROPOSAL

Please find on behalf of **(Company Name)** to provide HQ SACT with services (collectively referred as “ITEMS”), subject to the provisions, terms and conditions stated in IFIB ACT-SACT-22-132 and the **(Company Name)** Technical proposal”, submitted in accordance with solicitation provisions.

| | | | |
|------------------------|--------------------------------------|---|---|
| Service Area | Base Period 01Jan2023–31Dec2023 | Option Period 1 01Jan2024 –31Dec2024 | Option Period 2 01Jan2025 –31Dec2025 |
| HQ SACT | Hourly Rate: (1800 hours) | Hourly Rate: (1800 hours) | Hourly Rate: (1800 hours) |
| SME CHINA EXPERT | \$ | \$ | \$ |

| | | |
|------------------------|---|--|
| Service Area | Option Period 3 01Jan2026 –31Dec2026 | Option Period 4 01Jan2027–31Dec2027 |
| HQ SACT | Hourly Rate: (1800 hours) | Hourly Rate: (1800 hours) |
| SME CHINA EXPERT | \$ | \$ |

Total Contract Value (Base + Option Periods) \$ _____

Please verify and acknowledge propriety of above, by duly completing signatures below.

Authorizing Company Official:

Printed Name: _____
 Position: _____
 Title: _____

Authorizing Company (Signature): _____, Date: _____.

Company name Witness Official:

Printed Name: _____
 Position: _____
 Title: _____

Witness Signature: _____, Date _____

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NOTE: Proposed rates must be fully “loaded” [G&A, O/H etc.], however they must not include per diem (meals & lodging) and travel. Travel (and related expenses) will not be covered under this contract, but handled separately in accordance with the ACT Financial Manual.

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Enclosure 6 (Statement of Work)

STATEMENT OF WORK

1. Introduction

NATO established Headquarters Supreme Allied Commander Transformation (HQ SACT) in Norfolk, VA, in 2003 to lead warfare development efforts and improve military capabilities to meet 21st century security and defense requirements. This work encompasses the need to enhance the Alliance's ability to apply a comprehensive approach to the conduct of future operations and engagement with partners, NATO's interaction with non-NATO entities that include states, non-state actors, international and non-governmental organizations.

The Strategic Plans and Policy Directorate (SPP) acts on behalf of SACT to formulate policies, strategies, engagements, ACT contributions to NATO Defence Planning Policy (NDPP), and analytical practices that enable the Commander to provide strategic foresight, planning, strategy and policy advice, concepts and strategic engagement to NATO's political and military leadership..

2. Background and Scope of Work

2.1 Background.

Strategic Foresight Branch operates under the direction of the Deputy Chief of Staff (DCOS) SPP. The Strategic Foresight (SF) Branch conducts strategic foresight and operational framing to identify trends and associated defense, security and military implications that support the Allies gaining shared understanding of the future security environment. The Branch provides analysis of trends, including corresponding interactions/convergence that may cause instability situations, as well as resulting challenges and opportunities.

A specific capacity has been created to develop those trends further in regard of a China perspective.

2.2 Contractor Support.

Contractor will be part of the China analysis and cross function analysis capacity, which is overseen by a SF officer.

3. Type of Contract and Period of Performance

3.1 Type of Contract.

This is a Firm-fixed Price Level of Effort Contract in accordance with the General Terms and Conditions; as such it is a Level of Effort contract with a maximum limit or fraction thereof as set forth in the Statement of Work. All employer responsibilities for the Contractor personnel performing under this Contract shall lie with the Contractor.

3.2 Period of Performance.

Base Period is 01 January – 31 December 2023 with four 12-month option periods:
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01 January – 31 December 2024, 01 January – 31 December 2025, 01 January – 31 December 2026, 01 January – 31 December 2027. Option periods shall be exercised at the sole discretion of the HQ SACT Contracting Officer, based on satisfactory work performance, available funding and on-going/evolving requirements.

3.3 Surge Capability.

A surge capability requirement is included to have a contract vehicle in place should emerging circumstances require a quick and temporary increase in contractor support (LOE or Deliverable) to meet new requirements within the scope of the existing Statement of Work. The Supplier shall be prepared to provide support services per labour category described above. The contractor shall be prepared to evaluate requirements and submit a price proposal for any new in scope requirement for consideration by HQ SACT. Surge proposals will be evaluated by the Contracting Officer for fair and reasonable pricing and should be developed based upon the same pricing structure as the original contract proposal. The rate for surge effort shall not exceed the base/option year rate. Surge requirements will be incorporated by formal contract modification. Requests for pricing are made on a non-committal basis and do not constitute a formal commitment by HQ SACT to contract for additional work; supplier will not be reimbursed costs for preparing price proposals or other related expenses in response to a surge request. HQ SACT surge efforts will not exceed 80% of the annual contract value or 80% of the cumulative contract value. Requests to surge from other organisations outside of HQ SACT are not counted against the HQ SACT when calculating the surge tolerances.

4. Place of Performance

HQ SACT shall serve as the habitual residence for performance under this contract. The Contractor is expected to perform the majority of the required work at HQ SACT in Norfolk, Virginia or in alternate locations as per travel requirements at locations specified by the Contracting Officer's Technical Representative (COTR). It is anticipated that there will be approximately 2 trips per year, for approximately 10 days in duration per trip. NATO travel regulations and reimbursements are covered in Chapter 10 of the approved version of the Allied Command Transformation (ACT) Financial Manual, and are available at: <http://www.act.nato.int/forms-contractor-travel>. The COTR and Contracting Officer must approve trips and per diem in advance of all travel.

5. Partial Bidding and Teaming Arrangements

Partial bidding is not allowed.

6. Tasking and Deliverables - Estimated Level of Effort (LOE)

a. The LOE is as per the requirements stated herein, corresponding to a full time allocation of one individual to complete the tasks and activities described in this SoW.

b. The Contractor shall contribute to building/maintaining the situational awareness and the understanding of China and the Asia-Pacific region, supported by the

development of new deliverables and emerging work stands. The Contractor will perform the following requirements:

- Research prevailing national, international and NATO-relevant political, social, scientific and technological, economic, environmental, and military issues to identify strategic trends and implications related to China and Asia-Pacific;
- Develop and maintain a China and Asia-Pacific community of interest for ACT within NATO and with broader relevant parties, including IOs, NGOs, think tanks, academia and industry regarding existing and emerging strategic issues;
- Collaborate as approved in the program of work with HQ SACT teams to provide regional expertise on China and Asia-Pacific;
- Support the implementation of findings and in ACT programs of work and, where appropriate, liaise with other NATO bodies. Deliver as required written material and briefings related to his/her competences to internal and external audiences;
- Be available to ACT leadership for China related requirements;
- Provide support to Strategic Foresight team for ACT conferences and workshops that address issues related to China and the Asia-Pacific;
- Assist in the hand-over of work and contacts to the enduring manning within SF when reassigned.
- Develop and make available within ACT and for wider distribution as appropriate reports, briefings, papers, or other deliverables that contribute to a better understanding of China;
- Participate as required to populate SF portal;
- Fulfill other specific China related tasks directed by the COTR.

7. Contractor Performance Requirements and Reporting

a. The Contractor shall submit a monthly report to the Contracting Officer, via the COTR, detailing progress on the SoW for the reporting period. The report shall include, but not be limited to, the following information:

- i. Summary of work for tasking and deliverables during reporting period;
- ii. Current or anticipated problems/deficiencies and recommended solutions.

b. The COTR reserves the right to amend the reporting requirements to receive alternate/additional data and information on a more frequent or less frequent basis, and to request other reports that detail designated aspects of the work or methods to remedy problems and deficiencies. The Contracting Officer shall receive a minimum of a monthly report, regardless of COTR changes.

c. The COTR may identify missing, erroneous, or unnecessary requirements and tasking. The Contractor is expected to work closely with other team members, SMEs, and designated HQ SACT personnel. Consequently, the Contractor is expected to promptly address all identified problems and deficiencies, providing the COTR with written information on how the problem shall be corrected and any impact to on-going work.

8. Personnel Required for Statement of Work

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This is a Level of Effort contract with a maximum limit or fraction thereof as set forth in the Statement of Work.

Contractor shall:

- a. Demonstrated experience in corporate, government, or academic environment in analysis in the area of cultural Chinese awareness studies;
- b. Demonstrated expertise on China and the Asia-Pacific (some combination of a tertiary education level degree in Chinese studies and experience in living/working in China);
- c. Knowledge of Chinese political / geopolitical, human, economical, technological and environmental issues;
- d. Demonstrated fluency in English and Mandarin languages (written and spoken). The Contractor should hold at least a HSK4 level certification (Hanyu Shuipoint Kaoshi) in Mandarin.

Personal attributes:

- a. Ability to build cooperative relationships with academia and governmental partners;
- b. Possess a high level of organizational and coordination skills:
 - Capacity to work under general direction within a clear framework of accountability with substantial personal responsibility. Plan, schedule and monitor work activities in order to meet time and quality targets and in accordance with established procedures;
 - Ability to effectively multi-task and propose prioritization in a fast-paced environment;
 - Ability to effectively work in a cross-group collaborative environment, quickly understand the needs of HQ SACT and support the collective effort to reach the fixed objectives.
 - Work effectively as a member of a multi-national and multi-disciplinary team;
 - Execute a broad range of complex professional or technical work activities in a variety of contexts.
- c. Have a proven expertise in research studies:
 - Knowledgeable of research activities conducted in relevant accredited academic institutions and organizations related to China and/or the Asia-Pacific region;
 - Ability to quickly and efficiently sort through data to identify key issues or variables to consider in making important strategic decisions and to transform into staff products, reports, and analysis that can be consumed by a wide range of audiences;
 - Maintain awareness of developing trends and understand the implications of new concepts and technologies, in order to assess or evaluate risks;
 - Absorb new information rapidly and apply it effectively in relevant internal business areas or external agencies;
 - Select appropriately from applicable standards, methods, tools and applications;
 - Apply analytical and systematic approach to problem solving;

- Summarize large amounts of written material;
 - Use contemporary office tools, including MS Office and communication systems.
- d. Possess strong communication skills:
- Communicate and present complex information in English, both orally and in writing, effectively to specialist and non-specialist audience;
 - Ability to influence team and specialist peers;
 - Ability to prepare and develop for ACT leadership briefings, background papers, reports, and speeches.

9. Proof of Past Performance

The Contractor is to provide a minimum of two past performance citations (for work within the past five years) to show successful completion of work that is similar to or directly traceable to the requirements outlined in this SoW. The citations shall include the following information at a minimum:

- a. Summary of work performed that is similar to or directly relates to this SoW.
- b. Status of work (i.e., on-going, complete).
- c. Outcome of above mentioned work performed.
- d. Date of work performance.
- e. Name of client or employer.
- f. Complete contact information for client or employer.
- g. Written permission to contact client or employer for reference.

10. Required Travel for Personnel Services Contracts

The contractor may be requested to support SF workshops and therefore travel as required to the workshop location.

11. Furnished Materials and Services

In order to perform the work required under this SoW, HQ SACT shall provide all necessary working space; office furniture; telephones; computers, software, peripherals, and support equipment; office supplies; classified/unclassified storage space; and access to unclassified and classified NATO wide area networks (WAN) (granted on an as needed basis to individuals with appropriate security clearances) and the Internet for work to be performed at all NATO sites. The Contractor is not authorized to make any permanent/semi-permanent physical modifications to the HQ SACT facilities.

12. Security

- a. Security Clearances. The Contractor shall possess a minimum NATO Secret Facility Security Clearance (FSC) without storage, and all contractor employees performing work on this contract shall possess a minimum NATO Secret Personal Security Clearance (PSC). No waiver to these requirements shall be granted.
- b. The Contractor must adhere to all current NATO, HQ SACT and national security policies, directives, and guidelines for the duration of the contract.
- c. The Contractor shall abide by the security restrictions regarding carrying and using electronic devices (e.g., laptops, cell phones) in HQ SACT. The Contractor shall be responsible for satisfying the necessary clearance from HQ SACT Security

Office before bringing any such device, personal or contractor owned, into the HQ SACT work environment.

d. Building, Installation Access. The Contractor shall be fully responsible for ensuring that he/she has all needed vehicle passes and decals, and individual access badges and documents for appropriate access to the HQ SACT facility. The Contractor shall submit requests for site access to SACT HQ, Attention Security Office, and 7857 Blandy Road, Suite 100, Norfolk, VA 23551-2490.

13. Security Considerations for the Deliverables

Export Control : NATO nations have regulations and laws applying to the export of defense related goods/ services originating from domestic commercial sources to foreign entities. Usually under those laws and regulations, NATO is considered a foreign entity. The following requirements of this statement of work are provided in order to allow the bidder/Contractor the opportunity to assess the applicability of their pertinent national laws and regulations and take action, as required, (Reference, Part One A, General Terms & Conditions).

Intellectual Property : All services, products, and intellectual property provided under this statement of work will be delivered for the sole ownership of and the copyright by HQ SACT

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Annex A (Technical proposal Assessment) to Enclosure 6 (Statement of Work)

TECHNICAL PROPOSAL ASSESSMENT

Contractor’s technical proposals will be assessed on the qualifications of the individuals proposed to perform the work. Individuals’ résumés will be measured against each of the criteria specified below in order to ascertain whether the individuals have adequately demonstrated that they possess the required qualifications. HQ SACT reserves the right to conduct interview of nominated candidate(s). Examples of how detailed knowledge levels were attained are expected. Ultimately Contractor companies shall clearly demonstrate by providing unequivocal reference to where candidates meet the criteria set forth in this solicitation.

The bids will be evaluated against the following levels:

- Compliant (C) = Meets the criterion
- Non-compliant = Proposal will be deemed non-

| ITEM | COMPLIANT | NON-COMPLIANT |
|--|-----------|---------------|
| Currently possesses a minimum of a NATO Member national SECRET level security clearance. At time of award, individual possesses a minimum NATO Secret PSC. | | |
| Proposed candidate is national of NATO Member nation. | | |
| Minimum of one past performance citation within the last five years to show successful completion of work that is similar to or directly traceable to this SoW’s requirements. | | |

| # | CRITERIA | RANGE | SCORE |
|------------------|----------|-------|-------|
| CHINA SME | | | |

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| | | | |
|---|---|---|--|
| 1 | Demonstrated research experience conducted in relevant accredited academic institutions and/or organizations or similar experience, related to China | < 2 years: 0 2 years: 5 3-4 years: 10 > 5 years: 15 *A zero does NOT disqualify candidate. | |
| 2 | Possess a degree, or similar experience, related to China (i.e. International Relations/Language/History) | < 2-year degree: 0 2-year degree or equivalent: 3 4-year degree or equivalent: 5 Masters degree: 10 PhD: 15 | |
| 3 | Having lived/worked in China region. | < 2 years: 0 2 years: 5 3-4 years: 10 > 5 years: 15 *A zero does NOT disqualify candidate. | |
| 4 | Possess experience in corporate, government, or academic environment in analysis in the area of international relations and security studies or similar experience. | < 2 years: 0 2 years: 5 3-4 years: 10 > 5 years: 15 | |
| 5 | Published work that demonstrates knowledge of China political / geopolitical, human, economical, technological and/or environmental issues. | None: 1 Academic thesis: 3 In a professional journal: 10 In a peer-reviewed journal: 15 | |
| 6 | Demonstrated fluency in English. When not a native English speaker, the individual should fulfill at least SLP 3333 (ref. STANAG 6001) or equivalent English Language | No certification or insufficient : 0 SLP 3333: 5 Above SLP 3333 or native speaker: 10 | |
| 7 | Demonstrated fluency in Mandarin language (written and spoken). The individual should hold at least a HSK4 level certification (<i>Hanyu Shuipoing Kaoshi</i>) in Mandarin. | < HSK3: 2 HSK4: 5 HSK5: 10 HSK6: 15 | |

*Bidders shall provide self-evaluation of grading matrix within their technical proposal to include

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reference to page number/paragraph number/cite reference from within their technical proposal that proves requirement is met. Lack of self-evaluated matrix could lead to a disqualification of bid submittal. Discretion left to CAC board members.

**Grade of zero will result in a non-compliant and disqualification from the bidding process, unless otherwise annotated within the grading matrix.

Terms and Conditions

HQ SACT General Terms & Conditions dated 01/26/2022 apply to this contract and can be reviewed at www.act.nato.int/contracting under *Contractor Information*.