



**HQ Supreme Allied Commander Transformation  
Purchasing and Contracting Section  
Office of Budget and Finance**  
Norfolk, Virginia | USA



**INVITATION FOR INTERNATIONAL BIDDING**

**IFIB-ACT-SACT-26-01**

**Vendor – Augmented Next-Gen Guidance and Responsive Development**

**(VANGARD)**

## IFIB-ACT-SACT-26-01

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## BIDDING INSTRUCTIONS

### 1. General

This is a Firm Fixed Price deliverables contract in accordance with the HQ SACT General Terms and Conditions; Contract Award is contingent upon funding availability; Partial bidding is allowed.

**HQ SACT GENERAL TERMS AND CONDITIONS DATED 03/13/2024 ARE APPLICABLE TO THIS PROCUREMENT AND CAN BE LOCATED ON THE ACT WEBSITE AT [WWW.ACT.NATO.INT/CONTRACTING](http://WWW.ACT.NATO.INT/CONTRACTING) UNDER CONTRACTOR INFORMATION.**

### 2. Classification

This Invitation for International Bidding (IFIB) is a NATO UNCLASSIFIED document.

### 3. Definitions

- (a) The "Prospective Bidder" shall refer to the entity that 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 Headquarters Supreme Allied Commander Transformation.
- (g) The term "ACT" shall refer to Allied Command 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.

### 4. Eligibility

This IFIB is open to governmental or commercial entities:

- (a) Established in a North Atlantic Treaty Organisation Alliance member nation.
- (b) Working in the required field and legally authorised to operate in the country or countries in which this contract is to be performed at the time of bidding.
- (c) Has performed the desired past performance including size, cost and scope, as described in this IFIB.
- (d) **All proposed key personnel on this requirement must be citizens of a NATO member nation.**
- (e) The Contractor Company must hold a Facilities Security Clearance (FSC) at NATO or National SECRET or above IAW AC/35-D/2003-REV5 and ACT D 070-001.

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- 1) If the bidder does not have an active FSC at the time of bidding and/or there is a national process that precludes issuing an FSC until award, the bidder must indicate this within the proposal in lieu of providing the FSC information.
- 2) If the bidder is successful, however, any contract award shall be on a provisional basis and final award will not be approved until the NSA/DSA has provided an assurance that the bidder has been granted an FSC at the required level.
- 3) The bidder is not expected to manage any materials at the facility during the bidding period or project delivery in this case.
- 4) Bidders are requested to investigate national FSC procedures and advise the anticipated approval timeline within the proposal.

### 5. Duration of Contract

- (a) The contract awarded shall be effective upon date of award.
- (b) **Period of Performance**
  - i. Base Period: 1 January 2026 – 31 December 2026
  - ii. Option Period One: 1 January 2027 – 31 December 2027
  - iii. Option Period Two: 1 January 2028 – 31 December 2028
  - iv. Option Period Three: 1 January 2029 – 31 December 2029
  - v. Option Period Four: 1 January 2030 – 31 December 2030
- (c) Additional option periods shall be exercised at the sole discretion of the HQ SACT Contracting Officer, based on satisfactory work performance, availability of funding, and ongoing or evolving requirements.

### 6. Exemption of Taxes

In accordance with the agreements, (Article VIII of the Paris Protocol, dated 28 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.

### 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.

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- (b) HQ SACT invites bidders to submit questions related to this IFIB **no later than 11 November 2025 at 0900 hours, Eastern Time, Norfolk, Virginia, USA.**
- (c) Information in response to all questions for clarification to a prospective bidder shall be furnished to all prospective bidders at <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 responses and/or interpretations shall not be binding.

### 9. Bid Closing Date

Bids shall be received at HQ SACT, Purchasing and Contracting Office, **no later than 05 December 2025 at 0900 hours, Eastern Time, Norfolk, Virginia, USA.** No bids shall be accepted after this time and date. **No hard copy proposals will be accepted.**

### 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.

### 11. Content of Proposal

The company description portion of its technical proposal shall be limited to 10 pages. This is **not** the page limit for the entire technical proposal.

A table of contents for the entire proposal:

- (a) The bidder's full name, address, point of contacts, email address, telephone, fax number, and website;
- (b) Proposal Content Checklist (See Enclosure #1);
- (c) Compliance statement (See Enclosure #2);
- (d) Past performance (See Enclosure #3);
- (e) Provision of technical and price volumes;
- (f) Compliance matrix (See Annex B to Statement of Work).

### 12. Proposal Submission

- (a) Proposals shall be submitted electronically in two separate **PDF** documents; one containing the Technical Proposal in **PDF form** and one containing the Price **Proposal in excel document**, each emailed separately to:
- (b) Technical Proposal: [hqsact.techproposal@nato.int](mailto:hqsact.techproposal@nato.int)
- (c) Price Proposal: [hqsact.priceproposal@nato.int](mailto:hqsact.priceproposal@nato.int)
- (d) Email subjects shall include the solicitation information along with company name (for example: IFIB-ACT-SACT-26-01\_Tech\_ABC Inc. / IFIB-ACT-SACT-26-01\_Price\_ABC Inc.). Allow sufficient time in your submission should you encounter email size challenges.
- (e) **Price proposals shall be in U.S. Dollar currency.** Contractor may request payment post award in alternate currency based on agreed conversion rate.
- (f) Prices shall be on a Firm Fixed Price Basis and include any relevant discount schedule.
- (g) No oral bids or oral modifications or telephonic bids shall be considered.

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- (h) It is the ultimate responsibility of a prospective bidder prior to submission that all proposal submissions are reviewed to ensure they meet the technical, contractual 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 mishandling shall the bid be considered.
- (b) A delay in email exchange due to the server or size restrictions does not constitute a delay by NATO.

### 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.
- (b) HQ SACT is not responsible for any content that is not clearly identified in any proposal package.
- (c) Proposals shall be evaluated and awarded based upon the proposal that represents the best value to NATO. The following factors are considered:
  1. Successful administrative submission of bid packages as requested in paragraph 11, as listed in this IFIB.
  2. Successful determination of compliance with mandatory criteria.  
(Compliant/non-compliant)
  3. Technical factors / pricing factors rated the following: **Technical / Price = 70/30**
  4. Acceptance of HQ SACT General Terms and Conditions.

### 16. Proposal Clarifications

HQ SACT reserves the right to seek clarification on submitted proposals.

### 17. Award

- (a) HQ SACT intends to award a **firm fixed price deliverables contract** to Bidders whose proposal represents the **Best Value** offer to NATO. Partial awards for each tasking group shall be considered up to a maximum of three awards per group.
  - a. Subsequent Work Orders under this framework agreement will be provided to all awardees of each identified group, the evaluation of responses will be LPTA (lowest price technically acceptable).

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- b. Responses to the Work Order shall be submitted within 10 business days of request for proposal.
- (b) HQ SACT reserves the right to confirm information from references provided by the bidder regarding its past performance. Bidders must provide authorization to contact references.
- (c) 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 regarding this IFIB. Such adherence shall ensure Fair and Open Competition with equal consideration to all interested parties.

### 19. Points of Contact:

**(PLEASE INCLUDE ALL BELOW ON ALL CORRESPONDENCE)**

Robert Friend	Contracting Officer	<u><a href="mailto:Hqsact.contracting@nato.int">Hqsact.contracting@nato.int</a></u>
Catherine Giglio	Contracting Officer	<u><a href="mailto:Hqsact.contracting@nato.int">Hqsact.contracting@nato.int</a></u>
Laurent Munter	Contracting Officer	<u><a href="mailto:Hqsact.contracting@nato.int">Hqsact.contracting@nato.int</a></u>

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### Enclosure 1: Proposal Content / Checklist

#### PROPOSAL CONTENT / CHECKLIST

##### Table of Contents

- The bidder's full name, address, points of contact, email address, telephone, fax number, and website (part of technical proposal).
- Compliance Statement (part of technical proposal).
- Past Performance (part of technical proposal).
- Technical Proposal.
- Price Proposal.
- Compliance matrix (See Annex B to Statement of Work).

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**Enclosure 2: Compliance Statement**

**COMPLIANCE STATEMENT TO SEALED BID IFIB-ACT-SACT-26-01**

It is hereby stated that our company has read and understands all documentation issued as part of IFIB-ACT-SACT-26-01. Our company proposal submitted in response to the referenced solicitation is fully compliant with the provisions of IFIB-ACT-SACT-26-01 and the intended contract with the following exception(s); such exceptions 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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Company: \_\_\_\_\_ Signature: \_\_\_\_\_

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

Company Bid Reference: \_\_\_\_\_

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**

**(Company is required to submit minimum of three past performances in the last ten years.)**

**PAST PERFORMANCE INFORMATION FORM**

Awarded Company Name<sup>1</sup>:

Contract No<sup>2</sup>:

1. Customer Name:
2. Type of Contract (Firm Fixed Price, IDIQ, Requirements):
3. Title of Contract:
4. Description of Work Performance and Relevance to Current Acquisition (deliverables provided, services performed, summary of staff used, etc.):
5. Contract Award<sup>3</sup>:
  - (a) Total Contract Value (Prime Vendor):
  - (b) Total Contract Value to the Awarded Company:
6. Period of Performance:
7. Valid Point of Contact, Company Address, Email and Telephone No. of Reference:
8. Indicate Whether Awarded Company Acted as Prime or Sub-contractor:
9. Comments regarding compliance with contract terms and conditions:
- ~~10. Complete Contact Information for client:~~
11. Permission to contact customer for reference: Yes/ No<sup>4</sup>

**Name/Signature of Authorized Bidding Company Official**

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(signature)

**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.**

<sup>1</sup> Legal name of the Bidder's Company which was awarded and performed in the referenced contract.

<sup>2</sup> Solicitation Number, Purchase Order, or Reference Number of contract.

<sup>3</sup> Bidder shall specify the total value of the overall contract and the value awarded specifically to the Awarded Company. These values may be the same if they are the prime vendor.

<sup>4</sup> If denied, this will not be considered a valid past performance.

## Enclosure 4: Mandatory Price Proposal Excel Spreadsheet

### SEALED BID PRICE PROPOSAL

#### **SUBJECT: IFIB-ACT-SACT-26-01**

Please find on behalf of ( **Insert: Bidding company's Name** ) to provide HQ SACT with services (collectively referred as "ITEMS"), subject to the provisions, terms and conditions stated in IFIB-ACT-SACT-26-01 and the "**Insert: Bidder's Name Technical Proposal**", submitted in accordance with solicitation provisions.

Proposed rates must be **fully "burdened"** [e.g., General and Administrative (G&A), Overhead (O/H), risk, 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 under a separate contract.

Pricing shall be submitted using the excel workbook provided. Bidders may elect to submit a second PDF proposal for pricing if the excel workbook is provided as well.

Proposals not submitted in the proper format will not be considered.

Pricing will be evaluated on a weighted scale (30 percent of overall evaluation):

- A. 70% weighting on the Average Cost over the entire contract period of performance per group (base plus options).
- B. 30% weighting on the Range of the Costs in performance levels over the entire contract period of performance (base plus options). Highest proposed rate minus the lowest proposed rate over the duration of period of performance per group.

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**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: \_\_\_\_\_

**Annex A**  
**STATEMENT OF WORK (SOW)**  
**Vendor – Augmented Next-Gen Guidance and Responsive Development**  
**(VANGARD)**

## **1. Introduction**

This statement of work (SOW) specifies the products that the company's personnel will be required to deliver in support of Allied Command Transformation (ACT) programmes and initiatives. The situation in which NATO must operate, adapt and transform is multi-faceted and volatile. It is anticipated that the situation may include persistent uncertainty and complexity, that speed of decision-making and action will be increasingly essential, a network of cooperative partnerships will remain an indispensable source of opportunity, NATO's technological advantage will be increasingly challenged, and cognitive and virtual dimensions will become increasingly contested in a pervasive information environment.

## **2. Background and Scope of Work**

- a. The Alliance's Military Instrument of Power (MloP) must be employed in a variety of ways and contexts, all of which may be needed concurrently. These may include the following:
  - i. Shape – situations where the MloP is used to set conditions (as part of a combination of different instruments of power: diplomatic, information, military, economic) favourable to the Alliance security, for example, by influencing and changing the behaviour of potential adversaries and/or engaging with and supporting partners facing security challenges.
  - ii. Contest – situations where the MloP could be used to counter efforts by potential adversaries to challenge Alliance or Allies' security in one or several domains, primarily by non-military means and below the threshold of armed conflict.
  - iii. Fight – situations where Alliance or Allies are directly attacked in multiple domains inside or outside SACEUR's AOR and the MloP is used to respond.
- b. The future capabilities required by NATO are many and diverse. These are likely to include:
  - i. Command & Control across all environments;
  - ii. Impacts of new technologies;
  - iii. Ability to counter Capabilities of future adversaries;
  - iv. Seamless integration of (future) sensors;
  - v. Combination of kinetic and non-kinetic fires;
  - vi. Control of the information environment;
  - vii. Training through live, virtual, and constructive simulations and war-games; and
  - viii. Development of artificial intelligence, data science, automation and human-machine learning capabilities.
- c. Required Effects. The VANGARD contract gives HQ SACT timely access to the leading-edge information and quality support necessary to tackle challenges and problems whose size and complexity defy solutions by solely using existing staff or tools

within NATO's established organisation. VANGARD is an integral part of SACT's comprehensive organizational and operating strategy that enables mission accomplishment by integrating high quality deliverables from trusted industry partners, with the unique and manifold capacities of NATO's established workforce and toolset. Furthermore, in contrast to conventional long-term, level of effort contracts, VANGARD uses a "Just in Time" (JIT) approach to obtaining essential deliverables from industry. The use of JIT offers efficiencies as support is provided only when it is needed. NATO's Peacetime Establishment (PE) comprises the Alliance's standing workforce, whereas VANGARD should provide agile and temporary additives to the efforts of the PE through high quality deliverables. Success in delivering JIT requires adherence to the following:

- i. Close and active links to support an unambiguous dialogue between HQ SACT and the Contractor are of the utmost importance. This close relationship will set the conditions for mutually beneficial interaction from which both HQ SACT and the VANGARD Contractors can derive the shared situational awareness which is key to making JIT work.
- ii. The Contractors should be highly responsive and have access to a range of expertise commensurate with the Demonstrated Competencies and Deliverables described in this SOW.
- iii. Strategic Factors Driving VANGARD Contract Deliverables
  1. Driver: Strategic Concepts. NATO's operational and transformational direction are set by the concept for Defence and Deterrence of the Euro-Atlantic (DDA) and the NATO Warfighting Capstone Concept (NWCC). This contract will contribute to developing NATO's strategic, operational, and transformational concepts by supporting the scoping, assessment, and refinement of subordinate concepts and conceptual development.
  2. Driver: Warfare Development. The Warfare Development Agenda (WDA) is the implementation of the NWCC, through a series of themed "imperatives": Influence and Power Projection, Layered Resilience, Cognitive Superiority, Integrated Multi-Domain Defence and Cross Domain Command. This contract will contribute to the development of these imperatives, through requirements research, use of data centric technology, personnel skills, etc.
  3. Driver: Capability Development. ACT has key roles in the development of alliance forces and capabilities through the NATO Defence Planning Process and Common Funded capability development process. This contract will contribute to the scoping, assessment, and development of capabilities, in areas such as requirements analysis and development (via wargaming, modelling and simulation, and / or structured elicitation), capability planning, programming, experimentation, acceptance testing, etc.
  4. Driver: Decision Support and Policy Planning. ACT conducts strategic analyses and experiments as tools through which to discover, assess, and validate courses of action. These take the form of strategy and policy development, studies, wargames, simulation modelling, "Net

Assessment”, data analytics, etc. This supports deliberate decision making, shapes consensus, and builds momentum for transformation among stakeholders. ACT has a structured programme of work to advance areas of interest, and responsively exploits time-sensitive opportunities. This contract will support both programmed and urgent scenarios

### 3. Type of Contract and Period of Performance

a. **Type of Contract:** This is a firm fixed price deliverables framework contract.

b. **Period of Performance:**

- i. Base Period: 1 January 2026 – 31 December 2026
- ii. Option Period One: 1 January 2027 – 31 December 2027
- iii. Option Period Two: 1 January 2028 – 31 December 2028
- iv. Option Period Three: 1 January 2029 – 31 December 2029
- v. Option Period Four: 1 January 2030 – 31 December 2030

### 4. Tasking and Deliverables

a. As the NATO Alliance’s leading agent for change, SACT’s mission is largely exploratory in nature. As such, while the HQ SACT Peacetime Establishment (PE) staff are able to forecast some aspects of the annual programme with a good degree of certainty, other parts of the programme can be expected to evolve more incrementally as previously unknown factors materialise. This volatility is an enduring characteristic that must be accounted for in the design and operation of the VANGARD Contract. Before the start of the base year, and each subsequent year if an option is exercised, HQ SACT will notify the Contractors about known requirements for Deliverables. Then, within each year of contract operation, HQ SACT will notify the Contractors about emergent requirements and call for Deliverables as and when appropriate. Deliverables will therefore fall into two categories as follows:

- i. Forecast Deliverables: Deliverables that address requirements known to HQ SACT at the start of a contract/calendar year.
- ii. On-call Deliverables: Deliverables that address emergent requirements, or for which the details are finalised within a contract/calendar year.

b. All Deliverables will be initiated through a Task Order issued by HQ SACT. A Task Order may cover a single Deliverable or sets of multiple Deliverables.

- i. The Contractor shall provide a Basis of Estimate (BOE) to HQ SACT for each Deliverable, or set of Deliverables, ordered in a Task Order. The purpose of the BOE, which shall accompany each Price Proposal, is to help manage risk by ensuring a common understanding. The BOE presents an opportunity, at the Price Proposal stage, for the Contractor to demonstrate, by showing resourcing assumptions, a clear understanding of what constitutes a realistic approach to the tasks inherent in developing and delivering the required product(s). As a minimum, the BOE shall include the following:

- 1. A breakdown assessment of the tasks needed to accomplish the Deliverable.

2. The intended Performance Level to be used. Given the connection between Performance Levels and price, the contractor is expected to price against the identified level and estimated hours to achieve the required outcome outlined in the Task Order.
  3. Contractor personnel utilized in the development of the deliverables must meet the qualifications set forth in the identified Performance Levels (Annex E).
- c. HQ SACT requirements for both Forecast and On-call types of Deliverables will be characterised by the following:
- i. Developed in accordance with the identified Demonstrated Competencies (Table 1).
  - ii. Limited to the products described in the Deliverables Summary (Table 2).
- d. Deliverable Summary
- i. Deliverables are due as per the specific Task Order for each deliverable/set of deliverables, unless the COTR specifies otherwise. Deliverables shall provide information required by this SOW and amplified in the specific individual deliverable Task Order. Deliverables shall be complete, stand-alone, and provide the necessary products described in respective Task Order paragraphs. Deliverables shall be submitted and exchanged electronically. The COTR may specify alternative or additional formats or copies. The contractor shall provide deliverables on the date due as an electronic file that will be finalized after review by the COTR.
  - ii. HQ SACT will endeavour to review, accept, or comment on the draft deliverable within 20 working days.
  - iii. After HQ SACT reviews and comments on the deliverable, the contractor shall incorporate HQ SACT input and submit change pages into the final electronic deliverable within 7 working days from the receipt of the comments, unless this timescale is extended by the COTR (such as in cases where further consultation is in the HQ's best interest).
  - iv. The Contractor shall analyse and identify issues, and formulate and provide courses of action for issue resolution. The Contractor will be developing and delivering products that support the requirements of a broad cross-section of branches, divisions, and directorates. Furthermore, the Contractor will be required to interact effectively with Allied Command Operations (ACO), subordinate commands, Nations, and NATO agencies, including the NCI Agency and others as designated.
  - v. VANGARD products may contribute in part, not fully, to the overall progress/completion of a programme or project. If required and deemed appropriate to provide a satisfactory deliverable, the selected Contractor may be required to collaborate with other contractors.
- e. Security of Deliverables.
- i. The security classification of the majority of deliverables under this contract may range from NATO Unclassified through NATO SECRET. In limited cases, work may also be necessary at the NATO COSMIC TOP SECRET level. In such

cases, the requirement to work at this higher level of classification will be described in the individual Task Order for the specified deliverable.

**Table 1. Demonstrated Competencies**

- The groupings represent opportunities for Partial Bidding by Group.
- For compliance in any given Group, the Bidding Company shall demonstrate successful delivery of services or products in a portion of the Serials of a given Group in the past ten (10) years
- Each group will have maximum 3 awardees.

Serial	A. Futures, Strategy and Policy Group
1	<p><b>Future Operating Environment</b> to support the exploration and understanding of the future operating environment and within the environment, the enhancement of cooperation, planning and information sharing with Allies, Partners and non-NATO actors. Proficiency in strategic foresight and trend analysis, integrating geopolitical, technological, demographic, and environmental drivers. Experience in scenario development and wargaming to explore plausible futures and their implications for force design. Demonstrable experience in synthesizing intelligence, science, and operational lessons to identify emerging threats, opportunities, and capability gaps. Experience in joint, Allied, and interagency partners for shared situational awareness.</p>
2	<p><b>Military Strategy and Policy</b> to support development of domain and functional strategies, responses to political warfare, identification of strategic issues, geopolitical analysis, threat assessment, and policy planning. It requires a deep understanding of joint, interagency, and Allied operations to align national power instruments—diplomatic, informational, military, and economic—toward cohered objectives. Competence in risk management and decision-making under uncertainty is essential, balancing deterrence, escalation control, and resource constraints. Must be able to translate complex ideas into actionable guidance for political leaders and operators.</p>
3	<p><b>Adversary perspectives and Red Teams</b> to support thinking from the perspective of NATO’s real and potential adversaries. This consists of anticipating enemy intentions, capabilities, and courses of action beyond friendly assumptions. Demonstrated use of structured analytic techniques to expose cognitive biases and challenge groupthink. Skilled in operational art and doctrine to realistically model both friendly and opposing forces. Possesses cultural and psychological insight to understand how adversaries perceive risk, opportunity, and escalation thresholds.</p>
4	<p><b>National and Alliance Resilience</b> to support systems thinking that maps interdependent critical infrastructure, supply chains, and societal functions. Demonstrated expertise in risk assessment and scenario modelling to evaluate vulnerabilities to kinetic, cyber, economic, and natural threats. Proven record of integrating cross-sector perspectives—government, private industry, and civil society—to design layered mitigation strategies. Able to convey complex interdependencies to policymakers and the public without inducing panic. History of strategic foresight analysis to anticipate emerging risks and update resilience plans as conditions evolve.</p>

<b>Serial</b>	<b>B. Emerging and Disruptive Technologies (E&amp;DT) Group</b>
<b>5</b>	<b>Emerging and Disruptive Technologies</b> to support the exploration, understanding, and assessment of EDT focus areas (such as Artificial Intelligence, robotic and autonomous systems, quantum technologies, novel materials and advanced manufacturing, hypersonic technologies, energy and propulsion technologies, biotechnology and human enhancement, next generation networks (e.g. 5G and 6G) and others) to enhance cooperation, planning and information sharing with Allies, Partners and non-NATO actors.
<b>Serial</b>	<b>C. Command &amp; Control (C2) Group</b>
<b>6</b>	<b>Joint &amp; multi-domain C2</b> , including integration with non-military instruments of power; requirements definition, concepts and experimentation, dependencies and interoperability verification to plan, task, execute, and assess military operations in a coordinated and synchronized manner across military domains.
<b>7</b>	<b>Domain-specific C2</b> requirements definition, concepts and experimentation, dependencies and interoperability verification to plan, task, execute, and assess military operations. NATO's operational domains are: Air, Land, Maritime, Cyberspace, and Space.
<b>8</b>	<b>Nuclear Consultation, Command, and Control (C3)</b> , requirements definition, concepts and experimentation, dependencies and interoperability verification to plan, task, execute, and assess military operations.
<b>9</b>	<b>Joint Intelligence, Surveillance &amp; Reconnaissance (JISR), Targeting, and Synchronization of Effects</b> , to enable commanders, staffs, and forces to understand the operating environment; and cohere and align targets, fires, and effects across operational domains and operating areas.
<b>Serial</b>	<b>D. Domain Development Group</b>
<b>10</b>	<b>Space Domain</b> requirements definition, concepts and experimentation, dependencies and interoperability verification to plan, task, execute, and assess military operations.
<b>11</b>	<b>Cyberspace Domain</b> requirements definition, concepts and experimentation, dependencies and interoperability verification to plan, task, execute, and assess military operations.
<b>Serial</b>	<b>E. Cognitive Effects Group</b>
<b>12</b>	<b>Strategic Communications (STRATCOM)</b> including Information Environment Assessment, Public Diplomacy, Public Affairs, Military Public Affairs, Information Operations and Psychological Operations.
<b>13</b>	<b>Cognitive Warfare</b> , including behavioural science and technological enablers; identification, characterization, and mitigation of adversary actions; building force and Alliance resilience.
<b>Serial</b>	<b>F. Counter Threat</b>

14	<b>Explosive Ordnance Disposal and Counter- Improvised Explosive Device (CIED)</b> to enable an understanding of the operational environment from tactical to strategic levels.
15	<b>Electronic Warfare (EW)</b> to enable an understanding of the operational environment from tactical to strategic levels.
16	<b>Weapons of Mass Destruction (WMD) and Chemical, Biological, Radiological and Nuclear (CBRN)</b> to enable an understanding of the operational environment from tactical to strategic levels.
<b>Serial</b>	<b>G. Operational Enablement Group</b>
17	<b>Medical Support</b> to reduce medical shortfalls experienced on NATO operations. Interoperability verification of delivered capabilities with other NATO, national, and partner capabilities.
18	<b>Logistics Management</b> to optimize the collaborative planning and coordination of logistic support to NATO operations. Interoperability verification of delivered capabilities with other NATO, national, and partner capabilities.
19	<b>Military Engineering</b> , including Alliance strategic infrastructure standardization and availability, and battlefield mobility / counter-mobility. Requirements definition, concepts and experimentation, dependencies and interoperability verification to plan, task, execute, and assess military operations.
<b>Serial</b>	<b>H. Decision Analysis Group</b>
20	<b>Quantitative Analysis</b> of products and reports to support and enable situational awareness, visualization, information fusion, course of action analysis, cost estimation, schedule estimation, and benefit analysis at the NATO political and strategic military level.
21	<b>Qualitative Analysis</b> of products and reports to support and enable situational awareness, visualization, information fusion, descriptive and conceptual analysis at the NATO political and strategic military level.
22	<b>Modelling and Simulation</b> products and reports to support decisions on the optimal use of resources and capabilities at the NATO political and strategic military level.
23	<b>Wargaming</b> products and reports to support the adversarial investigation, assessment, and analysis of courses of action, technology, strategic and operational military plans, or other environmental interactions.
24	<b>Strategic Analysis</b> of products and reports to support the investigation, conduct, analysis, and writing of strategic level studies in current warfighting domains and new domains.
25	<b>Data Science and Visualisation</b> of products and reports to support business understanding, data understanding, data preparation, data modelling, model evaluation, model deployment, and model monitoring.
26	<b>Business Analysis</b> of products and reports to support the investigation, conduct, and ongoing support to business and operating model change.

<b>Serial</b>	<b>I. Administrative Support</b>
<b>27</b>	<b>Procurement and Contracting/Fiscal Support</b> Related process improvement/acquisition development support.
<b>28</b>	<b>Legal Support</b> Legal support and research concerning defence, security, space, intellectual property, autonomous systems, artificial intelligence, and similar advanced technology applications in various sectors as it relates to requirements.

**Table 2. Deliverables**

**Note:** This table describes specific products, as contributions to ACT programmes and projects, which HQ SACT anticipates may be ordered for delivery via VANGARD. In all cases, VANGARD products shall contribute in part, not fully, to the overall progress/completion of a programme or project. In addition to the contributions made by the VANGARD contractor, and NATO staff, HQ SACT reserves the right to obtain contractual support from sources other than VANGARD where to do so is in the best interests of the Alliance.

<b>Serial</b>	<b>Deliverable Product Title</b>
<b>1</b>	<b>Contract Delivery Reports/Contract Activity Forecast Reports:</b> Routine products supporting contractor/client coordination.
<b>2</b>	<b>Research Papers:</b> Products that explain a topic in depth, based on information from sources such as books, articles, interviews, and Internet sites. It should also be based on the author's ideas, knowledge, and opinions.
<b>3</b>	<b>Concept Development:</b> Products supporting the description of a method or scheme for employing specified military capabilities in the achievement of a stated objective or aim. This description may range from broad to narrow. It may range from describing the employment of military forces in the broadest terms and at the highest levels to specifying the employment of a particular technology system or the application of a particular training system.
<b>4</b>	<b>Capability Development:</b> Products that contribute or support the development of NATO Common Funded capabilities, such as operational requirements analysis, development of Analysis of Alternative deliberations, CIS costs estimates and Capability Acceptance Activities.
<b>5</b>	<b>Technical Trials:</b> Products supporting the planning, design, execution and analysis of technical trials, leading to the delivery of first impression or formal reports with an emphasis on evidence-based findings. This includes reports from interoperability related trials.
<b>6</b>	<b>Wargames:</b> Products supporting the planning, design, execution and analysis of wargames, leading to the delivery of first impression or formal reports with an emphasis on evidence-based findings.

<b>7</b>	<b>Experimentation:</b> Products supporting the planning, design, execution and analysis of experiments, leading to the delivery of first impression or formal reports with an emphasis on evidence-based findings.
<b>8</b>	<b>Business Process Modelling:</b> Analyses of “as-is” business processes and performance/delivery of further analyses for determining and documenting improved “to-be” business processes.
<b>9</b>	<b>Strategic Level Analytical Studies:</b> Products that contribute to part or all of a strategic study.
<b>10</b>	<b>Decision-Making Aids:</b> Products that contribute to part or all of quantitative or qualitative decision-making tools.
<b>11</b>	<b>Event Facilitation:</b> Products and activities that contribute to part or all key events (e.g. event support, conference administration etc.).
<b>12</b>	<b>Software Development:</b> Secure, interoperable command-and-control systems that enable real-time situational awareness and decision support. They encompass data integration platforms, analytics dashboards, and digital tools that enhance planning, coordination, and wargaming across domains.

## 5. Acceptance Criteria

Acceptance criteria for each deliverable will be in line with the guidance provided by COTR. These will be established in detail at the Kick-Off meeting, in consultation with the stakeholders. Part of any bid should provide estimate of output and work against each deliverable to enable effective and collaborative establishment of deliverable acceptance criteria.

- a. The Contracting Officer Technical Representative (COTR) is responsible to:
  - i. Resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the Task Order;
  - ii. Review and approve all Contractor outputs/products for completeness and accuracy;
  - iii. The COTR shall review the Contractor’s work at regular intervals as required. The COTR’s written approval of work reported, and deliverables submitted is mandatory for Contractor invoices to be successfully processed.
  - iv. The COTR/D-COTR shall receive a letter of appointment from the Contracting officer that describes in detail his/her roles and responsibilities to which he/she shall sign formal acceptance.

## 6. Points of Contact for Contractor Company

- a. The Contractor company interface for direction and guidance will be the designated COTR. Management by the COTR will be complemented, at individual Deliverable-level, by those PE staff member(s) responsible for the particular programme or project to which the VANGARD product(s) will contribute. The COTR shall resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the Task Order. The COTR can recommend to the Contracting Officer (who has final authority) that the contract/Task Order be amended, extended, or cancelled due to evolving requirements, new tasking, and/or technical non-performance.

## **7. Contractor Performance Requirements and Reporting**

- a. The Contractor shall report to the COTR and the Contracting officer, detailing progress on the Task Order for the reporting period. The report shall include, but not be limited to, the following information:
  - i. Summary of work (by contractor position) for tasking and deliverables for the reporting period.
  - ii. Current or anticipated problems/deficiencies and recommended solution.
- b. The COTR may amend the reporting requirements to receive alternate and/or additional data and information on a more frequent or less frequent basis and may request other reports that detail designated aspects of the work or methods to remedy problems and deficiencies. The Contracting Officer shall receive at least one monthly report, regardless of COTR changes. However, note that the report is NOT a deliverable subject to acceptance.
- c. The designated COTR shall identify missing, erroneous, or unneeded requirements and tasking. Consequently, the Contractor company is expected to promptly address any identified problem or deficiency, providing the COTR with information on how the problem shall be corrected and any impact to on-going work mitigated.

## **8. Proof of Past Performance**

Minimum of three past performance citations within the last ten years to show that it has successfully completed work that is similar to or directly traceable to the requirements outlined in this SOW.

## **9. Physical Security**

- a. **Personnel Clearances:** Contractor shall be responsible for obtaining all needed security clearances prior to assigning personnel to develop deliverables on-site at HQ SACT or other NATO entities. All Contractors working on-site shall have a minimum of a SECRET security clearance (as issued by NATO or the respective national Department / Ministry of Defence (DoD / MoD). No clearance or waiver to this requirement shall be granted, and no Contractor shall be given access without having the needed clearance in place.

The Contractor Company must certify that proposed candidates hold the appropriate clearance and can produce deliverables in accordance with the Performance Levels identified.

- b. **Security Conditions:** The Contractor must adhere to current security conditions at HQ SACT and other NATO provided work sites. Contractor personnel shall comply with all local host nation, NATO security provisions and other policies and procedures, as required.
- c. **Facility Security Clearance:** The Contractor Company must hold a Facilities Security Clearance (FSC) at NATO or National SECRET or above.
- d. **Building/Installation Access:** The Contractors are fully responsible for ensuring that they have all needed vehicle passes and decals, and individual access badges and documents for appropriate access to the HQ SACT and US Naval Support Agency facilities. The Contractor Company shall submit requests for site access to SACT HQ, Attention Security Office, at 7857 Blandy Road, Suite 100, Norfolk, VA 23551-2490.
- e. **Electronic Devices:** The Contractor shall abide by the security restrictions regarding carrying and using electronic devices (e.g., laptops, cell phones) in the HQ SACT. The Contractor shall be responsible for staying the necessary clearance from the HQ SACT Security Office before bringing any such device into the HQ SACT work. If required, as determined by the COTR, HQ SACT may provide access to NATO Information and Communication Technology (ICT) capabilities, but otherwise, the contractor will provide their own equipment.

**Annex B  
Requirements Matrix**

SER	ITEM	COMPLIANT	NOT COMPLIANT
1	Bidding Company is registered and licensed in a NATO Member nation.		
2	Contractor Company holds Facilities Security Clearance (FSC) at SECRET or Higher.		
3	Minimum of three past performance citation within the last ten years to show that it has successfully completed work that is similar to or directly traceable to the requirements outlined in this SOW.		
4	<del>Demonstrated proficiency in English as defined in STANAG 6001 (Standardized Linguistic Profile (SLP) 3333 – Listening, Speaking, Reading and Writing) or equivalent.</del>		
5	<del>Active NATO or National SECRET (or higher) security clearance.</del>		
6	Must score a minimum of <b>70 points</b> to be technically acceptable.		
7	<p><del>Compliant: At least one CV of a named individual is submitted for each Performance Level, for each Contract Serial, stating how the example individual aligns to the performance levels. The same CV may be submitted against multiple technical Groups (if appropriate).</del></p> <p><del>Non Compliant: No CVs of named individuals have been identified for at least one PL in a technical Group, where the bidder indicates that they are competing for that technical Group.</del></p>		

<p><b>Serial</b></p>	<p align="center"><b>Scoring Range</b></p> <p align="center"><b>ANY SCORE OF ZERO IN A SINGLE SERIAL OR A TOTAL CUMULATIVE SCORE BELOW 70 POINTS IS <u>NON-COMPLIANT</u></b></p>	<p><b>Document reference to where and how Bidding Company meet the criteria (page, paragraph, line #, ref to CV)</b></p>	<p><b>Technical Score</b></p> <p><i>(100 pts possible. Technical score under 70 is considered non-compliant)</i></p>
<p><b>1. Demonstrated Group Competencies</b></p>	<p><i>Maximum of 50 points – scored separately for each Group in Table 1</i></p> <p><b>Understanding of Group</b></p> <ul style="list-style-type: none"> <li>• Demonstrated understanding of all Serials (listed in Table 1) within the Group. Clear understanding of the concerns and relevant factors affecting NATO and a strategic military / transformational Command, and how the supplier will mitigate / exploit those factors in the conduct of tasks. (25-40 points)</li> <li>• Demonstrated understanding of at least 75% of Serials within the Group. Clear understanding of the concerns and relevant factors that a National governmental organization must take into account, and how the supplier will mitigate / exploit those factors in the conduct of tasks. (11-24 points)</li> <li>• Demonstrated understanding of some Serials within the Group. Identified relevant concerns and factors that may be required. Some consideration for how issues and concerns are address in the conduct of tasks. (1-10 points)</li> </ul> <p><b>Use of Relevant Tools, Technology, and / or Methodologies</b></p> <ul style="list-style-type: none"> <li>• Demonstrates access to (at no additional cost), and use of industry standard tools, technology, and methodologies, highlighting the relevance and benefits to deliverables. (4-10 points)</li> <li>• Demonstrates use of industry standard tools, technology and methodologies. (1-6 points)</li> </ul>		

**2. Breadth and duration of relevant corporate experience**

**Maximum of 10 points**

*Note: examples of past performance are only considered relevant if delivered by the legal entity bidding for this contract, or an organization that is materially the same that was acquired by, merged with, or otherwise integrated with the legal entity bidding for this contract.*

“Relevant industries” are:

1. large companies (> 10,000 employees);
2. think tank / relevant charity / other policy-influencing small organizations;
3. military;
4. other public sector organizations.

**Breadth & duration of corporate experience**

- **Extremely strong.** All past performances were in the last 5 years and deliver comparable consulting products and services, to 3 of the 4 relevant industries, in the field of the Technical Group submitted for. In each case, the work delivered directly accelerated the customers’ outcomes with high impact. Past performances demonstrate a culture of flexibility and value-focus to adjust to changing circumstances. (8-10 points)
- **Strong.** All past performances were in the last 7 years and deliver comparable consulting products and services, to 2 of the 4 relevant industries relevant industries, in the field of the Technical Group submitted for. In most cases, the link between successful delivery and accelerating customer outcomes is clear. Past performances demonstrate processes that are flexible and responsive to changing circumstances. (6-7 points)
- **Good.** One past performance is more than 7 years ago. All deliver comparable consulting products and services to 2 of the 4 relevant industries, in the field of the Technical Group submitted for. In each case, the benefits of the work clearly support customer outcomes. Past performances demonstrate ability to be flexible. (4-5 points)
- **Moderate.** Multiple past performances are more than 7 years ago. The benefits of the work support the intended customer

Serial	<p style="text-align: center;"><b>Scoring Range</b></p> <p style="text-align: center;"><b>ANY SCORE OF ZERO IN A SINGLE SERIAL OR A TOTAL CUMULATIVE SCORE BELOW 70 POINTS IS <u>NON-COMPLIANT</u></b></p>	<p style="text-align: center;"><b>Document reference to where and how Bidding Company meet the criteria (page, paragraph, line #, ref to CV)</b></p>	<p style="text-align: center;"><b>Technical Score</b></p> <p style="text-align: center;"><i>(100 pts possible. Technical score under 70 is considered non-compliant)</i></p>
	<p>outcomes. (2-3 points)</p> <ul style="list-style-type: none"> <li>• Low. Past performances demonstrate work delivered to the contracted time, cost, and scope / quality parameters. (1 point)</li> <li>• No documented experience (0 points)</li> </ul>		

<p><b>3. Strength and relevance of CVs</b></p>	<p><b>Maximum of 20 points</b></p> <p><i>Note: if the CVs you provide exceed the baseline measures <b>grade descriptions</b> set out in this SOW, your CVs set the benchmark quality standard that defines each performance level (PL). Future CVs must be qualitatively comparable in skills and experience.</i></p> <p><i>CVs submitted for a PL that do not meet the expected PL descriptions set out in this SOW will not be considered.</i></p> <p>“Relevant industries” are:</p> <ol style="list-style-type: none"> <li>1. large companies (&gt; 10,000 employees);</li> <li>2. think tank / relevant charity / other policy-influencing small organizations;</li> <li>3. military;</li> <li>4. other public sector organizations.</li> </ol> <p><b>Breadth &amp; duration of corporate experience</b></p> <ul style="list-style-type: none"> <li>• Extremely high: All Senior and Expert CVs have more than 5 years (in the last 10 years) of experience delivering comparable consulting products and services, across (as a team) 3 out of 4 of the relevant industries, in the field of the Technical Group submitted for. (17-20 points)</li> <li>• High: All Senior and Expert CVs have at least 3 years (in the last 10 years) of relevant experience, across (as a team) 2 of the 4 relevant industries, in the field of the Technical Group submitted for. One team member has more than 7 years (in the last 15 years). (13-16 points)</li> <li>• Good: The majority of the submitted CVs have at least 3 years (in the last 10 years) of relevant experience in 1 of the 4 relevant industries. The team has experience across at least 2 of the 4 relevant industries. (9-12 points)</li> <li>• Moderate: The team has experience in 2 out of the 4 relevant industries, and allocate personnel with relevant experiences to expected tasks. (5-8 points)</li> <li>• Low: The team has experience in 1 out of the 4 relevant industries. Team experience is concentrated in a small number of individuals (1-4 points).</li> <li>• No documented experience. (0 points)</li> </ul>		
<p>4.Reach-back</p>	<p><b>Maximum of 10 points</b></p> <ul style="list-style-type: none"> <li>• Bid demonstrates that the bidder has access to, and demonstrated experience in dynamically adding into an ongoing project, specialist skills</li> </ul>		

Serial	<p style="text-align: center;"><b>Scoring Range</b></p> <p style="text-align: center;"><b>ANY SCORE OF ZERO IN A SINGLE SERIAL OR A TOTAL CUMULATIVE SCORE BELOW 70 POINTS IS <u>NON-COMPLIANT</u></b></p>	<p style="text-align: center;"><b>Document reference to where and how Bidding Company meet the criteria (page, paragraph, line #, ref to CV)</b></p>	<p style="text-align: center;"><b>Technical Score</b></p> <p style="text-align: center;"><i>(100 pts possible. Technical score under 70 is considered non-compliant)</i></p>
	<p>and additional resourcing to deliver a task. (7-10 points)</p> <ul style="list-style-type: none"> <li>• Bid demonstrates that the bidder has access to specialist skills and additional resourcing, and the ability to dynamically add them onto ongoing projects. (1-6 points)</li> <li>• Bidder states that project teams are inflexible, and changes take several months to realize. (0 points)</li> </ul>		
5. Quality Assurance Plan	<p><b>Maximum of 5 points</b></p> <ul style="list-style-type: none"> <li>• Quality assurance plan demonstrates flexible processes, appropriately tailored to risks and requirements. (4-5 points)</li> <li>• Quality assurance plan demonstrates flexible processes. (1-3 points)</li> <li>• Quality assurance plan is not provided. (0 points)</li> </ul>		
6. Continuous Improvement	<p><b>Maximum of 5 points</b></p> <ul style="list-style-type: none"> <li>• Strong, clear plan for improving performance, benefits, and value across multiple task orders over the duration of the contract (3-5 points)</li> <li>• Continuous improvement plan is weak (1-3 points)</li> <li>• No consideration of continuous improvement (0 points)</li> </ul>		

## **Annex C Company Responses to the SOW**

### **Introduction**

1. This section provides the requirements to be met in Bidding Company's responses to this SOW. The Evaluation Criteria and Checklist (Annex B) refers. Responses shall be in six divisions as follows:

- a) Review of Company Experience and Citations of Past Performance;
- b) Ability to Meet or Exceed Performance Levels;
- c) Company Access to Expertise and Reachback Capability;
- d) Quality Assurance Plan;
- e) Technical Approach; and
- f) Price.

### **Response Part 1 – Company Experience and Citations of Past Experience**

1. Contractor companies shall submit papers of no more than 12 pages (single-spaced) text, describing in detail their expertise and past experience in developing and delivering products outlined in this SOW. A clear understanding of ACT's activities is essential.
2. As NATO is an organization of 32 sovereign Nations, there is a requirement for the successful contractor company to have experience and a proven track record in multinational work, in particular within NATO. Contractor responses must include their past experiences with NATO, an overview of their activities in NATO nations, and describe how they are positioned to (1) readily integrate deliverables in a multinational team effort among ACT's military and NATO International Civilian components; (2) leverage industrial partners to complement NATO's military network, thereby helping to ensure that ACT has access to a powerful suite of information, knowledge and understanding relevant to Alliance transformation.
3. Contractor companies shall cite at least three past performances based on contracts held within the last ten years that are of similar scope, magnitude, and complexity to the tasks, activities, and deliverables detailed in this SOW, or succinctly state that they have no relevant, directly related or similar past performance experience. Contractor companies shall show this relevant past and present experience in a manner that is directly traceable to the requirements of the SOW section for which they are bidding.

### **Response Part 2 – Ability to Meet or Exceed Performance Levels (PLs)**

1. This SOW is for a wholly Deliverables-based contract in which labour categories do not apply. Instead, PLs are used as building blocks, denoting the expertise of the work force that the Company would assemble and apply to task orders placed in this contract. This section assesses Company's' understanding of the levels of experience and qualifications needed in the Contractor personnel who may be assigned to meet each level of Performance. The requirement for Performance Levels, and indicative profiles, are provided in Annex E. On contract award, the successful Vendor will be expected to employ the same benchmarking

standards when meeting future requirements; this will be subject to validation throughout the life of the contract.

2. Vendors shall provide an example (CV/resume) of an employee who could fulfil the requirements of each of the PL's. Note that it is assumed that all PL's listed will be needed to each of the categories for which partial bidding is allowed. To be valid, a partial bid must include an example employee for all of the PL's. CV should be no more than 2 pages.
3. The baseline PL's for Contractor Project Management of Deliverables are described at Annex E. Bidder responses which greatly exceed the baseline PLs described at Annex E, form the basis of the new standard definition for each PL.
4. The Contractor shall certify that all deliverables will be developed using the criteria established in the PL's.

### **Response Part 3 – Company Access to Expertise and Reachback Capability**

Given the exploratory nature of much of the work undertaken by HQ SACT, resilience in the VANGARD contractor personnel is essential. Reachback is intellectual support in-depth, providing accessible day-to-day expert assistance when necessary, by offering alternative approaches, advice and ideas based on relevant experience. Given the firm fixed price nature of this contract, each company shall describe how, in **no more than 5 pages** and at no additional cost, it will make reachback support available to its personnel who may need assistance with a complex challenge in developing a required deliverable. In the event that this would include Sub-Contractors, provide a sample of companies with which you have a current or previous prime/sub relationship.

### **Response Part 4 – Quality Assurance (QA) Plan**

In order to ensure that HQ SACT receives the best value possible from the contractor, there is a need for a reliable QA process. Contractor companies shall prepare a paper of no more than five pages on their proposed QA plan to ensure that deliverables meet quality expectations. Considerations should include structure, process, continuity, reporting, risk management and overall project management, in **no more than 5 pages**.

### **Response Part 5 – Technical Approach to Group**

In **no more than 5 pages per Group** (listed in Table 1), Contractor companies shall identify challenges, tools, technologies, and methodologies typically applied to produce the listed Deliverables (Table 2). The technical approach should demonstrate broad understanding of the Group (including applicable Serials), and how the Contractor will deliver relevant tasks. Note that specific requirements and scope of tasks will be detailed in Work Orders placed through the VANGARD framework.

### **AI Restrictions**

**AI-assisted tools must be disclosed when producing deliverables. No NATO provided information shall be uploaded to any AI tool.**

### **Response Part 6 – Price with Basis of Estimate**

Bids shall be assessed on meeting the foregoing response requirements to a technically acceptable standard, and on the price for PLs to fulfil the requirements of this SOW for the base and option periods as defined. Bidders shall propose an hourly rate, for each of the PLs for development of deliverables, to the standards specified in Annex A.

**Post Award Pricing.** A further price proposal review will be conducted with each individual deliverable ordered based upon this SOW, the relevant individual Task Order, and contractor Basis of Estimate

(BOE) provided for analysis. ***PL rates are to be used as a BOE allowing HQ SACT to make a Fair and Reasonable price determination.*** All deliverables are considered Firm Fixed Price and are expected to be invoiced at delivery or completion of established Milestones mutually agreed by HQ SACT and the Contractor.

## **Annex D Off-site and On-site Support**

### **Management of Working Locations**

1. Work of NATO UNCLASSIFIED or not classified nature, to develop deliverables, will be normally conducted at the Contractor's facilities. However, on occasions when close collaborative working with HQ SACT personnel is necessary, the Contractor may conduct work on-site at HQ SACT and other venues provided by HQ SACT. Work at a classification level of NATO RESTRICTED or higher will be conducted on-site at HQ SACT or at other secure venues provided by the HQ SACT.
  
2. On-site working space at HQ SACT is limited. As a result, the Contractor will be required to coordinate with the COTR for access to the available work spaces designated for contractor personnel. The purpose of this is to provide office space to contractor personnel on a temporary, as-needed, basis in order to make best use of the space and information technology available at HQ SACT. Due to the potential of split/multiple contract award, requests for use of this on-site working space should be coordinated through the COTR as soon as the requirement is identified and should be limited to the minimum time necessary to successfully produce the deliverable.

### **Furnished Materials**

For on-site work, HQ SACT shall provide access to working space, office furniture, telephones, computers, software, peripherals and support equipment, office supplies, classified/unclassified storage space, and access to unclassified and classified NATO SECRET Wide Area (NSWAN) networks and the Internet for work to be performed at all NATO sites. Access will be granted on an as-needed basis to individuals with appropriate security clearances. Contractor personnel are not authorized to make any physical modifications to the HQ SACT facilities. Contractors shall have full access the Microsoft Office Suite.

## **Annex E**

### **Performance Levels for Contractor Project Management of Deliverables**

#### **Introduction**

1. This contract is Deliverables-based. As such, HQ SACT seeks to ensure the basis of quality control by providing guidance on benchmark standards expected of the Contractor in the development and delivery of products. The guidance given below, in the form of performance level project management measures, is intended to help ensure a common understanding of the principal, executive, senior and expert level of the work to be carried out in developing and delivering products, and to contribute to meeting the quality assurance expectations of HQ SACT.

#### **Use of the Full Spectrum of Performance Levels**

2. This guidance will be employed by HQ SACT as a reference and compliance tool in assessing the accuracy of the Contractor's Basis of Estimate (BOE). A BOE will be a contract pre-requisite to accompany the price proposal for contract award consideration and subsequently for price proposals for products ordered in Work Package 2. While it is anticipated that the various Performance Levels (PLs) will be priced according to their relative levels of complexity, HQ SACT will, throughout the life of the contract, expect to see the full array of PLs employed. In reviewing BOEs, HQ SACT will expect to see evidence that the most economical and efficient use of PLs is intended by the Contractor.
3. New requirements may warrant development of further PLs to enable the fulfilment of deliverables. In such cases, the new measure(s) shall be developed and agreed by the Contractor, the COTR and the Contracts Officer, and incorporated by formal contract modification.

#### **General Measures**

4. All work on the development of VANGARD Contracts deliverables is expected to require, as a minimum, the following:
  - a. Develop and deliver products in the English language.
  - b. Develop and deliver products through Standard Automated Data Processing (ADP), Word Processing, Spreadsheets, Graphics presentations and Databases.
  - c. Capable of supporting temporary overseas travel, primarily to NATO nations.

#### **Baseline Measures**

5. **Senior level:** Ensure the successful development and delivery of high quality products on time. Successful delivery will result from the provision of multiple elements of expertise required across a variety of competencies and the ability to fuse the output from each competency into high quality products. Collecting, synthesizing, and analysing multiple source information to produce coherent reports with strategic relevance and value. Requires engaging successfully with senior staff and at MSc/MA level and higher. Prepare products for seminars, study groups and conferences, and interface effectively with executive decision-makers. Contribute to complex enterprises in multi-faceted environments.
7. **Expert level:** Major contributions in complex, multifaceted programmes and projects, concepts, trials and experimentation campaigns, programmes and project(s). Collaborative concept

drafting, trial planning, experiment design, defining objectives and priorities, evaluating performance, resolving problems, establishing quality control procedures, and coordinating with diverse stakeholders. Requires engaging at MSc/MA level and higher and among multinational participants. Concept writing. Experimentation theory, design, and application. Planning, scheduling and coordinating technical trials or experimentation activities. Originating innovative trials/experimentation schemes. Development of analytical test plans and procedures. Multinational Joint planning processes.

8. **Junior level:** Initiatives in the development of products including: studies, designs, execution planning, team-enabled data collection, data analysis, and reports. Large scale literature reviews and research efforts. Development of cogent analytical approaches to complex subjects. Requires engaging at BSc/BA level and higher, in task-dependent disciplines including science, engineering, communication, writing, journalism and critical thinking. Facilitating and presenting evidence-based, cogent results to senior-level decision-makers. Ability to organize and utilize a number of different techniques (e.g. storyboarding, table top exercises, workshops, and prototyping) to socially elaborate operational user requirements. Further, using operational analysis methods, documents the operational user requirements in standardized formats to enable transition to functional requirements. Ability to conduct the as is operational processes analysis, combined with known gaps and feasible mechanisms in order to provide an as-is business process documentation. The development of plans that will take policy, directive, gap analysis and user inputs to create an integrated implementation plan with the appropriate actors, due dates, product descriptions and oversight responsibilities.

### **Indicative Profiles**

9. All work on the development of VANGARD Contracts deliverables is expected to require, as a minimum, the following:

	<b>Senior Example 1 (Policy Development Manager / Policy Advisor)</b>	<b>Senior Example 2 (Manager - Big 4 / Strategy House)</b>	<b>Senior Example 3 (Senior Strategist)</b>
Summary	Leads research, stakeholder engagement, and drafting for complex or high risk policy topics, or lead development of novel policy responses	Leads small (3-10 person) consulting teams to deliver customer needs. Assigns project resources and manages relationships to achieve customer benefits	Leads complex strategy and transformation programmes. Supports C-suite / Ministerial / organizational leadership direction and guidance.
Education & Qualifications	Degree in relevant subject. Has led presentations and / or papers at relevant conferences, and published think pieces on relevant policy topics.	Post-graduate degree in relevant subject. Lead and / or contributing author of a body of papers / presentations on their professional practice.	Post-graduate degree in relevant subject.
Levels of Experience	<p>8-20 years of experience (depending on relevance of roles)</p> <ul style="list-style-type: none"> <li>* Lead author of influential white papers in their area of expertise, to set government departmental policy.</li> <li>* Leads business cases for government investment for low-risk / low value projects and supports high-risk / high value business cases.</li> <li>* Coordinates legal, finance, comms, and / or other functional teams to implement policy.</li> <li>* Creates SOPs and workflows to implement policy in areas of low to moderate complexity.</li> </ul>	<p>8-10 years experience managing analysts and delivering client-facing outputs.</p> <ul style="list-style-type: none"> <li>* Interprets legal and / or higher policy frameworks to design lower-level policy frameworks.</li> <li>* Regularly facilitates mid-level stakeholder workshops (e.g. business unit or site leads, government department policy teams, military OF-3 to OF-4 level) to diagnose, structure, and resolve issues, risks, and opportunities.</li> <li>* Occasionally facilitates high-level stakeholder workshops (C-suite, ministerial or senior civil servant, OF-5 to OF-8 level) to build consensus and leadership buy-in, and diagnose, structure, and resolve issues, risks, and opportunities.</li> <li>* Trusted to operate with limited Manager oversight on complex issues, and / or leads small teams of consultants to solve customer issues.</li> </ul>	<p>8-20 years experience managing analysts and delivering client-facing outputs.</p> <ul style="list-style-type: none"> <li>* Delivers options appraisals and strategy roadmaps balancing intended outcomes, implementation frameworks and plans, and available resources.</li> <li>* Assesses and coheres policy or business frameworks.</li> <li>* Leads assessments of organizational strategy (e.g. market segments and competitors, emerging and disruptive technologies, market forces and suppliers, adversaries and threats, etc.)</li> <li>* Leads assessments and implementations of organizational operating models</li> </ul>

	<b>Expert Example 1 (Policy Officer)</b>	<b>Expert Example 2 (Consultant - Big 4 / Strategy House)</b>	<b>Expert Example 3 (Strategic Analyst)</b>
Summary	Leads research, stakeholder engagement, and drafting for well-bounded, low risk areas that fit prior experiences	Leads and supports projects to scope, diagnose, structure, and address customer issues, risks, and opportunities.	Supports organizational strategy direction by delivering key information and analyses.
Education & Qualifications	Undergraduate degree in relevant subject.	Bachelor's degree or higher; may hold policy certifications.	Degree-level education; professional development in policy or strategy.
Levels of Experience	<p>4-10 years of experience in public policy or business policy development.</p> <ul style="list-style-type: none"> <li>* Leads discrete, bounded, and low- to moderate-risk policy areas and / or change projects.</li> <li>* Conducts stakeholder facilitation to diagnose, structure, and resolve issues, risks and opportunities.</li> <li>* Conducts stakeholder consultation and communications to build awareness.</li> <li>* Designs and conducts training to build awareness, skills, and competencies.</li> </ul>	<p>3–6 years in client-facing roles, supporting central government and defence or relevant industrial sectors.</p> <ul style="list-style-type: none"> <li>* Conducts stakeholder facilitation to diagnose, structure, and resolve issues, risks and opportunities.</li> <li>* Delivers process improvement and advisory support to companies or government units on well-bounded scopes.</li> <li>* Develops and delivers reports, customer and senior stakeholder briefs.</li> <li>* Advises and / or executes changes to programme and project governance attributes (scope, schedule, cost, performance, risk).</li> </ul>	<p>4-10 years, including experience in inter-service or Joint working, or work across government departments or recommending policy for international organizations.</p> <ul style="list-style-type: none"> <li>* Collects and analyzes data and models to support strategy formulation and assessment.</li> <li>* Contributes to assessments of organizational strategy and strategic options appraisals.</li> <li>* Aligns change projects to organizational operating model or strategy programmes.</li> </ul>

	<b>Junior Example 1 (Early Careers Policy Officer)</b>	<b>Junior Example 2 (Analyst - Big 4 / Strategy House)</b>	<b>Junior Example 3 (Domain relevance)</b>
Summary	Supports research, stakeholder engagement, and drafting policy documents.	Assists with analysis, presentations, and insight gathering for strategic initiatives.	Provides operational support to project teams with task-relevant domain knowledge.
Education & Qualifications	Undergraduate degree in relevant subject.	Post-graduate degree in relevant subject.	Undergraduate degree in relevant subject, or 5+ years' of directly-relevant domain expertise
Levels of Experience	1-3 years of experience in: <ul style="list-style-type: none"> <li>* Policy development, implementation, and / or assessment in a relevant environment</li> <li>* Data gathering and analysis, quantitative modelling</li> <li>* Research</li> <li>* Qualitative analysis</li> </ul>	1-2 years experience in analyst or graduate analyst role, doing: <ul style="list-style-type: none"> <li>* Data gathering and analysis, quantitative modelling</li> <li>* Research</li> <li>* Qualitative analysis</li> <li>* Drafting briefs, reports, and presentations under guidance</li> </ul>	1-3 years of experience in a junior role relevant to the military context of the task at hand. Able to provide operational support with contextual understanding of the issue and practical