

## **Statement of Work (SoW)**

### **Analysis Support Services**

#### **LESSONS LEARNED ANALYSIS PROJECTS**

##### **1. Introduction.**

The Joint Analysis and Lessons Learned Centre (JALLC) is a NATO entity located in Lisbon, Portugal. The JALLC Lessons Learned Analysis Division (LLAD) is tasked to complete analysis of the lessons that are of value to improving NATO's warfighting, warfare development and political military decision making. In 2026, the JALLC is tasked to lead the production of several Lessons Learned (LL) Analysis Reports to meet a wide range of requirements, including Lessons from Russia's War Against Ukraine, Integration of Electromagnetic Warfare into Joint Fires and Effects, Advising, Training and Capacity Building in NATO Mission Iraq, Cyber Domain Operations, and Audacious (Realistic) Training. Additionally, in response to the increased tempo of NATO exercise and operational activities, there is an increased demand for exercise support, and for JALLC to be prepared to respond flexibly to emergent analysis requirements during the year, including by the production of a new type of Rapid Response (R2) analysis report.

##### **2. Background and Rationale.**

The complexity of the upcoming 2026 programme necessitates confident, experienced analysts skilled in both quantitative and qualitative methods to work alongside the JALLC's military analysts. In 2026, JALLC will experience significant turnover among its military analysts, leaving its analysis capacity weakened, when both demand and complexity are at an all-time high.

The JALLC has assessed that it needs to augment its analysis capacity with two full-time contractor analysts, who will fully integrate into the LLAD, allowing for: surge capacity at key points during the year, e.g., when many observers need to be deployed to observe an exercise; additional technical support and capacity in analysis teams with new military analysts; and sufficient trained and experienced analysts to respond to emergent requirements during the year.

Delivering an agile and flexible Programme of Work (POW) requires additional workforce resilience. Two analyst contractors will provide the agility needed to respond effectively to R2 reports and to support the anticipated increase in dynamic exercise activity aligned with Audacious Training.

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**3. Scope: Tasks and Deliverables.**

- a. As a member of a LLAD, the contractors will be allocated to project teams where they are required to proactively, and with minimal supervision, use their knowledge and experience to plan, conduct, and lead assigned tasks and deliverables, such as those specified in this SoW. The contractors will work effectively and efficiently with JALLC staff to ensure their assigned tasks, deliverables, and performance, meet the standards in this SoW.
- b. **Tasks:** The contractors are required to perform tasks including, but not limited to, planning, conducting, or leading, in full or in part, the following:
  - i. Planning and conducting research/analysis, e.g., data collection, document research, research interviews, facilitating workshops, note taking at workshops;
  - ii. Application of qualitative and/or quantitative research methods;
  - iii. Developing, writing, reviewing, and revising analytical and communications products;
  - iv. Adjudicating and incorporating comments from internal and external reviewers into draft products;
  - v. Updating, maintaining, and archiving a reference library, reference database, and contacts list;
  - vi. Managing and verifying accuracy of references and citations;
  - vii. Identifying and engaging stakeholders internal and external to NATO;
  - viii. Attending and presenting at meetings, workshops and conferences; and
  - ix. Administrative tasks.
- c. **Deliverables:** The contractors are required to develop and deliver, in full or in part, interim and final products in accordance with deadlines specified during the Period of Performance. Such products include, but are not limited to, the following: Initiation Notifications, Project Plan, Data Collection Plan, Initial Findings, Product Outline, Initial Draft, Coordinating Draft, Final Product, Factsheet, Presentation Slides and Speaking Notes. The deadlines for delivering such products will be as set out in the relevant Project Plans.
- d. The tasks and deliverables set out in this SoW are intended only as general illustrations of the various types of work that may be assigned. The contractor may be assigned similar or related tasks or deliverables that are not mentioned in this SoW.

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**4. Type of Contract and Bid Evaluation.**

- a. **Type of Contract:** This is a **Firm-Fixed Price Level of Effort Contract** in accordance with the General and Special Terms and Conditions; the Overall Level of Effort under this contract is set forth in the SoW. All employer responsibilities for the contractor performing under this contract shall lie with the contracting firm, or directly with the contractor if the contractor is employed as an independent contractor.
- b. **Period of Performance:** Base Period is 05 January 2026 – 31 December 2026.
- c. **Option:** The contract may be extended beyond the Period of Performance for an additional period of up to 12 months, if the JALLC has a valid requirement and available resources, and the contractor's performance under this contract has been acceptable.
- d. **Overall Level of Effort:** Each contractor is required to provide an Overall Level of Effort of 225 working-units (days), i.e., 1800 working hours within the Period of Performance, which is considered to be the minimum effort required to provide the tasks and deliverables described in this SoW. One working day is usually defined as eight working hours.
- e. **Allocation:** The Level of Effort corresponds to a full time allocation of Two (2) individuals to effectively and efficiently deliver the tasks and deliverables described in this SoW.
- f. **Bid Evaluation:** Each submission to this solicitation shall be judged on a combination of pricing and technical information - **Best Value** Procurement Method in the following proportion: 80% Technical, 20% Price - provided in response to this SoW. To be eligible for evaluation, the submission should be complete according to the Eligibility Checklist in Annex B. JALLC technical evaluation of the bids will utilize the technical grading matrix in Annex C. JALLC may conduct technical clarification discussions with proposed candidates. JALLC reserves the right to engage in full and open competition after exclusion of non-compliant bids.
- g. **Technical Information.**

A complete set of technical information proving that the contractor possesses the Essential and Desirable Requirements and Personal Attributes in this SoW must be provided. All three parts specified as follows are required, if any parts are missing, the contracting firm or independent contractor shall be liable for bid non-compliance:

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- i. Prior Performance. Résumé/curriculum vitae including detailing dates of relevant experience, employer/academic institution, and short description of experience.
- ii. Supplementary Information. specifying how prior performance detailed on the Résumé/curriculum vitae satisfies the requirements in the grading matrix at Annex C.
- iii. Certificates/Diplomas. Copies of certificates/diplomas for qualifications.
- iv. Writing Sample. 400-500 word essay in English answering the question: *“Why are you (the contractor) the best suited person to deliver the work detailed in this SoW?”* The essay should use full paragraphs (not bullet points), be in the contractor’s own words, and meet the Written Work Quality Standards required in this SoW. Writing samples will be checked for the use of AI. If they appear to be generated by AI, the contracting firm or independent contractor shall be liable for bid non-compliance.

**5. Working Hours and Place of Performance.**

- a. **Normal Working Hours:** The contractor is expected to provide the Overall Level of Effort during JALLC Normal Working Hours. For the purpose of this SoW Normal Working Hours are Monday through Friday, from 08:30 to 17:30 (a lunch break may be taken between 12:00 and 14:00). The contractor will not be expected to provide Level of Effort days/hours on Portuguese national holidays. All absences during Normal Working Hours must be pre-approved in writing by the Contracting Officer Technical Representative (COTR). Work outside Normal Working Hours may be required and shall not entitle the contractor to financial compensation on top of the agreed upon firm-fixed-price daily fee. Any requirement for work outside Normal Working Hours will usually account for less than 5% of the Overall Level of Effort.
- b. **Normal Duty Station:** The contractor shall perform most of the required work at the JALLC, Avenida Tenente Martins, Monsanto, 1500-589 Lisbon, Portugal, which shall be considered the Normal Duty Station for this SOW.

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- c. **Alternate Locations:** The work under this contract may necessitate the contractor to deploy to other NATO member nations for periods of up to 14 consecutive days. The contractor must be prepared to deploy to any of these locations. All contractor travel must be pre-approved by the JALLC Chief of Staff. Travel by the contractor shall be authorized and reimbursed in accordance with HQ SACT Financial Policy Directive 60-1 Paragraph 6-32, "Contractor Travel" and JALLC SOPs. The contractor is required to work from Alternate Locations as per requirements of the Project. If Alternate Locations are more than 100km from the normal duty station, required travel will be subject to additional reimbursement in addition to the firm-fixed-price daily fee. No additional reimbursement will be provided for travel associated with working from alternate locations within 100km of the JALLC, Lisbon, Portugal.
- d. **Teleworking:** Teleworking is not expected during the Period of Performance. Nevertheless, all contractor teleworking must be directed by the COTR, to the LLAD Division Head and approved by the JALLC Chief of Staff. Working from the contractor's residential address in Portugal, or at an Alternate Location that is preferred by the contractor but not required by the JALLC, will not be subject to additional reimbursement.

## **6. Contractor Eligibility and Technical Requirements**

The contractor shall meet the following requirements.

### **a. Eligibility Requirements.**

- i. Nationality. Citizen of a NATO Member Nation. Proof by National ID or Passport.
- ii. Authorization. The contractor is licenced to live and work in Portugal for the Period of Performance. Proof by contract/declaration from contracting firm, or registration as an independent contractor.
- iii. Security Clearance. A minimum of NATO Secret personal security clearance (PSC). No waiver to this requirement shall be granted. Proof by valid security clearance certificate.
- iv. Availability and Travel. Able to work at the JALLC in Lisbon, Portugal during Normal Working Hours for the number of working days of the Overall Level of Effort, and prepared to travel to NATO member nations from Portugal during the Period of Performance. Availability to travel to according to the Project requirements, usually within NATO member nations. Proof by declaration indicating any periods of limited availability to report to the JALLC in Portugal or travel during the Period of Performance is required.

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**b. Essential Requirements.**

- i. Qualifications. Master degree in Applied Sciences, Social/Political Sciences, Natural Sciences, or History, or 6 years' research project team work experience
- ii. Military Staff Knowledge. Knowledge and understanding of military activities performed at strategic, operational and single service command HQs gained by working for or with military, or by in-depth study.
- iii. Research Project Team Experience. Work experience as a researcher/analyst working in project teams in a recognized research/analysis organization.
- iv. Writing Skills. Proven ability to produce clear, concise, accurate, logical and evidence-based written material in English.
- v. Language Skills. Advanced (V)/English SLP4444/Common European Framework C1 level.
- vi. Computer Skills. Intermediate level MS Word, MS Excel, and MS PowerPoint.

**c. Desirable Requirements:**

- i. Subject Matter Expertise. Experience, study or training in any of the following topics: Russia's War Against Ukraine, especially drone warfare, Electromagnetic Warfare integration in Joint Fires and Effects, NATO Training Mission Iraq, Cyber Domain Operations, Realistic Exercise Design and Delivery.
- ii. Understanding of NATO Military. Understanding of NATO military: concepts such as the Concept for the Deterrence and Defence of the Euro-Atlantic Area (DDA), and the NATO Warfighting Capstone Concept (NWCC); structures such as NATO Command Structure and NATO Force Structure, and Allied Joint Doctrines, especially AJP-1 and AJP-3.
- iii. Research Methodology. Demonstrated track record of successfully applying quantitative and qualitative research methods in customer-focussed research projects.
- iv. Communication Skills. Demonstrated track record of successfully communicating results of research/analysis to military audiences up to senior levels in meetings, reports and/or presentations.

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- v. Data Analysis Skills. Demonstrated track record of applying specialist software in a research/analysis project e.g. MaxQDA/NVivo, R/Python, Excel VBA.

d. **Personal Attributes:**

- i. Initiative. Able and keen to anticipate what needs to be done, and to take proactive action to solve problems and ensure work gets done effectively and efficiently.
- ii. Teamwork. Excellent interpersonal skills. Ability and desire to work with others. Flexibility and willingness to work in a leading or supporting role as the situation requires. Manages own work and time to coordinate with what is needed by the team.
- iii. Analytical mindset. Exhibits curiosity and scepticism in work and personal life. Actively seeks explanations to improve own and others' understanding. Applies creative and critical thinking to solve problems. Values precision and accuracy in work.

## 7. Contract Administration

a. **Points of Contact:**

- i. Contracting Officer: HQ SACT SAG BUDFIN, LCDR Juan Benavides.
- ii. Contracting Officer Technical Representative (COTR): JALLC Principal Operational Research Analyst, Ms. Jacqueline Eaton.
- iii. Deputy COTR: JALLC Senior Operational Research Analyst, Ms. Katie Mauldin.
- iv. Administrator: JALLC BUDFIN Administrator, Mr. André Grenho.

- b. **Contracting Officer Technical Representative:** The COTR is assigned by the Contracting Officer (in the HQ SACT Purchasing and Contracts Branch). The COTR shall receive a letter of appointment from the Contracting Officer that describes in detail their roles and responsibilities to which they shall sign for formal acceptance. The COTR shall:

- i. Provide direction, guidance, and support information to the contractor; including setting, reviewing and updating the specific tasks and deliverables required from the contractor;
- ii. Resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the SoW;
- iii. Review and approve the contractor's work and performance daily.

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- c. **Technical Supervision:** The contractor shall report to, and receive technical direction and guidance from the COTR. The COTR may delegate responsibility for managing and monitoring the contractor's daily work and performance to a COTR Designated Representative. The Points of Contact listed in this SoW and the contractor will be notified of any such delegation of COTR responsibilities in writing. In case of delegated responsibilities for daily management and monitoring, the COTR's written acceptance of work is still mandatory for invoices to be processed.
- d. **Disputes, Problems or Deficiencies:** The contractor should notify the COTR as soon as possible if they will be, or expect to be, unable to meet the quality standards applicable to their work for any reason. The contractor is also expected to work closely with JALLC personnel. In doing so, the contractor is expected to promptly address any issues directly with the personnel concerned. If disputes, problems or deficiencies cannot be resolved directly, the contractor is responsible to notify the COTR as soon as possible, and to provide the COTR with recommendations on how the dispute, problem or deficiency could be remedied, as well as their assessment of the potential impact of remedies to the situation on their performance under this SoW.
- e. **Acceptance.** The COTR's written acceptance of work is mandatory for contractor invoices to be successfully processed (see Annex A). Acceptance of work indicates that the COTR evaluates that the contractor's work is aligned with the intent of the tasks and deliverables in this SoW, and meets the standards for work and performance stated in this SoW.
- f. **Contractor Reporting.** The contractor shall submit a monthly report (see Annex A) 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 for the reporting period:
  - i. Level of Effort expended
  - ii. Tasks and deliverables provided
  - iii. COTR acceptance of the work
  - iv. Any current or anticipated disputes, problems, or deficiencies and recommended solutions.
- g. 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.

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- h. **SOW Amendments.** The Contracting Officer has final authority (in consultation with the COTR) to determine if the contract/SoW should be amended, extended, modified or cancelled for evolving requirements, new tasking, and/or technical non-performance.

**8. Standards of Work and Performance.**

COTR acceptance of work will be based on their professional judgement that the contractor is meeting the following standards of work and performance:

- a. **General Quality Standards:** The contractor has taken all reasonable steps to ensure that all the work they provide meets the following quality standards:
  - i. Complete – work completely fulfils the requirement.
  - ii. On time – work is delivered on time.
  - iii. Accurate – the contractor verifies the accuracy of their own work before delivery and corrects all errors as soon as they are identified.
  - iv. Coordinated – the contractor’s approach to the work is planned to align with others’ needs and adapted to meet emerging needs.
  
- b. **Written Work Quality Standards.** The contractor has taken all reasonable steps to ensure that all written work they provide for inclusion in JALLC written products complies with JALLC Standard Operating Procedure 810 and meets the following quality standards:
  - i. Coherent – sections and paragraphs are organized and flow in a logical manner.
  - ii. Clear – paragraphs, and sentences are easy to understand and unambiguous.
  - iii. Precise – words, punctuation and formats are correctly and consistently used.
  - iv. Evidence-based – arguments are supported by sufficient and relevant evidence, such evidence is accurately quoted and cited, and appropriate language is used according to the strength of the evidence.
  
- c. **Professional Conduct Standards:** The contractor is expected to conduct themselves in accordance with the current NATO Code of Conduct agreed by the North Atlantic Council (NAC), and thus display the core values of integrity, impartiality, loyalty, accountability, and professionalism, as well as to behave in accordance with the JALLC conduct, security, and safety regulations at all times.

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**9. Furnished Materials.**

- a. In order to perform the work required under this SoW, JALLC shall provide all necessary working space; office furniture; telephones; computers, software, peripherals, and support equipment; and office supplies.
- b. Classified/unclassified storage space; and access to unclassified and classified NATO networks (WAN) (granted on an as-needed basis to individuals with appropriate security clearances), and the Internet, for work to be performed at NATO sites.
- c. The contractor is not authorized to make any permanent/semi-permanent physical modifications to the JALLC facilities.
- d. All JALLC written and work-related products, including the project deliverables, furnished property, and non-expendable supplies purchased under this contract shall be, and shall remain, the JALLC's property. The contractor may not use JALLC or NATO property, including information accessed during the project, for personal gain.

**10. Security.**

- a. **Security Clearances:** The contracting firm shall possess a minimum NATO Secret Facility Security Clearance (FSC), and all contractors 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 applicable NATO, Bi-SC, ACT and JALLC policies, directives and procedures for the duration of the contract.
- c. **Electronic Devices:** The contractor shall abide by the security restrictions regarding carrying and using electronic devices (e.g., laptops, cell phones) in JALLC. The contractor shall be responsible for satisfying the necessary clearance from JALLC Security Office before bringing any such device, personal or contractor owned, into the JALLC work environment.
- d. **Building, Installation Access:** The contractor shall be fully responsible for ensuring that they have all needed vehicle passes, and individual access badges and documents for appropriate access to the JALLC facility. The contractor shall submit requests for site access to: JALLC Security Officer, JALLC, Avenida Tenente Martins, Monsanto, 1500-589 Lisbon, Portugal.

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- e. Services associated with this SoW may be classified up to NATO SECRET and should be handled in accordance with relevant NATO security policy. In accordance with NATO security policy, the contractor shall not share work produced under this SoW outside NATO without prior written permission from Commander JALLC.

### **11. Export Control.**

NATO nations have regulations and laws applying to the export of defence 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 SoW are provided in order to allow the contracting firm or independent contractor the opportunity to assess the applicability of their pertinent national laws and regulations and take action, as required.

### **12. Intellectual Property.**

All services, products, and intellectual property provided under this SoW will be delivered for the sole ownership of and the copyright by JALLC.

### **13. Contracting Firm or Independent Contractor Responsibilities.**

- a. **Authorization to Perform/Accreditation:** The contracting firm or independent contractor certifies that it has been duly authorized to operate and do business in Portugal. The contracting firm or independent contractor shall certify that the contractor performing services under this contract is a citizen of a NATO nation. In addition, the contracting firm or independent contractor shall certify that they have obtained all necessary accreditations, licenses and permits required in connection with the contract. The contracting firm or independent contractor shall fully comply with all the laws, decrees, labor standards and regulations of such country or countries during the performance of this contract; and agrees that no claim for additional monies with respect to any authorizations to perform shall be made upon JALLC.
- b. **Taxation:** It is the contracting firm or independent contractor's responsibility to ensure that all provisions related to taxation in Portugal are complied with. The JALLC can liaise with the Portuguese Ministry of Finance to ascertain that the contracting firm or independent contractor is following the correct procedures required by its status and shall immediately terminate the contract for default in case of non-compliance.

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- c. **Taxes and Custom Charges:** According to the NATO agreements, performance under the contract is exempt from taxes, duties and similar charges. Where notwithstanding, these are imposed by national regulations, bidders will enclose the list and the amounts of taxes (to include the VAT— Value Added Tax), duties and similar charges which have been included in their bid, with a justification. Authority for this tax and customs exempt status is included in the Paris Protocol (Article VIII) "Protocol on the Status of International Military HQs Set Up Pursuant to the North Atlantic Treaty", and the relevant Host Nation agreements drawn up in the application of Article XVI of the referred Protocol.
  
- d. In addition, it should be noted that all contractors shall note the appropriate convention (or protocol) between the government of the state where the contractor resides and the Portuguese Republic for the avoidance of double taxation and the prevention of fiscal evasion with respect to taxes on income.
  
- e. **Security Clearance:** The contracting firm or independent contractor shall be responsible for obtaining all required NATO security clearances effective as of the first day of the contract. No clearance or waiver to this requirement shall be granted; no contractor shall be assigned without having the needed clearance in place. If the contracting firm or independent contractor cannot prove the required security clearance, the contracting firm or independent contractor shall be liable for bid non-compliance. The contracting firm or independent contractor must provide advance written proof of security clearance.

#### **14. General Terms and Conditions.**

This SOW is subject the JALLC General Terms and Conditions set forth in the contract and to the Special Terms and Conditions for Short Term Operational Commercial Personnel Services.

During the time the Contractor provides its services to NATO – JALLC, there is a requirement to comply with all aspects of the NATO Policy on Preventing and Responding to Sexual Exploitation and Abuse.

#### **Annexes:**

- Annex A – Contractor Monthly Report
- Annex B – Eligibility Checklist
- Annex C – Technical Grading Matrix

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**Annex A**

**Contractor Monthly Report**

(to be filled electronically in pdf form provided)

**Part 1 – Contract Information** (completed by contractor, ask JALLC BUDFIN for 1.3-1.5)

1.1	Contractor Name, personal email and phone:			
1.2	Contracting Firm Contact, email, phone:			
1.3	Purchase Order Number:			
1.4	Period of Performance: (dd/mm/yyyy)	From:	To:	
1.5	Contracted Level of Effort (LoE): (days)			

**Part 2a – LoE Provided in Reporting Month** (completed by contractor) Reporting Month:

Day	Tasks/Deliverables Provided	LoE (hours)
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		
25		
26		
27		
28		
29		
30		
31		
2.1	Total LoE hours provided (hours, automatically calculated = sum(1 to 31))	0.00
2.2	<b>Total LoE days provided (days, automatically calculated = hours/8)</b>	0.000

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**Part 2b – Total Level of Effort (LoE) Expended in Period of Performance** (completed by contractor)

LoE provided by month of the Period of Performance (Fill all months up to and including month of this report, leave future months empty)			
January		July	
February		August	
March		September	
April		October	
May		November	
June		December	
2.3 Total LoE provided (days, automatically calculated = sum(Jan-Dec))			
2.4 LoE still to be provided (days, automatically calculated =1.5-2.3			

**Part 3 – Certification, Assessment, and Acceptance**

<b>3.1 Certification of work</b> (completed by contractor)			
a. Comment on own performance in the month of this report. Include any current or anticipated disputes, problems or deficiencies and recommended actions to resolve them.			
b. Contractor signature: I certify that the details I provided in this report are true and accurate.			
<b>3.2 Assessment of work</b> (completed by COTR Designated Rep.)			
a. I assess the quality of the work meets the quality standards of the Statement of Work as follows:			
<i>General Quality Standards</i>		<i>Written Work Quality Standards</i>	
Complete	(select item)	Coherent	(select item)
On Time	(select item)	Clear	(select item)
Accurate	(select item)	Concise	(select item)
Coordinated	(select item)	Evidence-based	(select item)
<i>Professional Conduct Standards:</i> displayed core values of integrity, impartiality, loyalty, accountability and professionalism.			(select item)
b. Comment on contractor performance in the month of this report. Include any current or anticipated disputes, problems or deficiencies and recommended actions to resolve them.			
c. COTR Designated rep. signature: I confirm my assessment of the quality of work in the month of this report.			
<b>3.3 Acceptance of work</b> (completed by COTR)			
a. Comment on contractor performance in the month of this report. Include any current or anticipated disputes, problems or deficiencies and recommended actions to resolve them.			
b. COTR signature: I accept that work provided in the month of this report meets the requirements of this Statement of Work.			

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**Annex B**

**Eligibility Checklist**

SERIAL I	PASS/ FAIL CRITERIA ITEMS	COMPLIANT	
		Y	N
1	Acknowledgment of Receipt and Acceptance of Invitation to Bid		
2	Bids submitted on time. ( <b>Deadline 1 December 2025, 16:00 HRS, Lisbon Time, Portugal</b> )		
3	Completed Eligibility Checklist (Annex B to the SoW)		
4	Bidder's Contact Details		
5	Proof the bidder is a national (independent contractors) / established (companies), in a NATO member nation.		
6	Proof the contractor is a licensed contractor in the required field and legally authorized to operate in Portugal.		
7	Proof of active NATO Secret personal security clearance, or assurance that security clearance application process is in progress and will be completed by the first day of the period of performance.		
8	Assurance of availability to provide the Overall Level of Effort at the JALLC in Lisbon, Portugal during Normal Working Hours and travel to NATO member nations during the Period of Performance. Indication of any periods of limited availability, or limited ability to travel during the Period of Performance.		
9	Price Proposal duly Signed and Filled		
10	Technical Information: a. Prior Performance detailed in Resume/Curriculum Vitae b. Supplementary Information Table (see Annex C) c. Certificates/Diplomas and any other relevant letters of recommendation, commendations d. Writing Sample 400-500 words (see paragraph 4 for instructions).		

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**Annex C**

**Technical Grading Matrix**

<b>Serial</b>	<b>Technical Requirement</b>	<b>Non-Compliant<sup>1</sup></b>	<b>Compliant<sup>2</sup></b>	<b>Exceeds Req.</b>
1	<p>Qualifications and Relevant Work Experience.</p> <p>(1) Master degree in Applied Sciences, Social/Political Sciences, Natural Sciences, or History, or 6 years' relevant (see Serial 1 (2)) work experience.</p> <p>(2) At least 3 years' work experience employed as a researcher/analyst (not manager) working in project teams (not independently) for a recognized research/analysis organization.</p> <p>(3) Demonstrated track record of successfully applying quantitative <u>and</u> qualitative research methods in customer-focussed research projects.</p>	<p><b>0</b></p> <p>Missing masters or enough relevant work experience</p>	<p><b>20.0</b></p> <p>(1) and (2) met</p>	<p><b>40.0</b></p> <p>Compliant plus several examples of use of qual. &amp; quant. research methods</p>
2	<p>Language/Writing/Communication Skills.</p> <p>(1) <a href="#">English Language</a> Advanced (V)/SLP4444/Common European Framework C1 level</p> <p>(2) Writing sample (400-500 words own writing in English), meets quality standards for written work.</p> <p>(3) Demonstrated track record of successfully presenting results of research/analysis to military audiences up to senior levels in reports and/or presentations.</p>	<p><b>0</b></p> <p>(1) or (2) not met, or evidence of AI use on (2)</p>	<p><b>10.0</b></p> <p>(1) &amp; (2) fully met</p>	<p><b>20.0</b></p> <p>Compliant plus writing sample exceeds and (3) demonstrated by several examples</p>
3	<p>Knowledge/Understanding.</p> <p>(1) Military HQs. Knowledge and understanding of military activities in strategic, operational and/or single service HQs gained by working for or with military in these HQs, or in-depth study of activity of these HQs.</p> <p>(2) NATO Military. Knowledge and understanding of NATO Military concepts, structures and doctrine from experience or in-depth study.</p> <p>(3) Subject Matter Expertise. Experience, study or training in any of the following topics: Russia's War Against Ukraine, especially drone warfare, Electromagnetic Warfare integration in Joint Fires and Effects, NATO Training Mission Iraq, Cyber Domain Operations, Realistic Exercise Design and Delivery.</p>	<p><b>0</b></p> <p>&lt;6 months knowledge of military HQs (1)</p>	<p><b>10.0</b></p> <p>&gt;6 months knowledge of military HQs (1)</p>	<p><b>20.0</b></p> <p>Compliant plus NATO or Subject Matter specific knowledge</p>
4	<p>Personal Attributes.</p> <p>(1) Teamwork. Excellent interpersonal skills. Ability and desire to work with others. Flexibility and willingness to work in a leading or supporting role as the situation requires. Manages own work and time to coordinate with the team.</p> <p>(2) Initiative. Able and keen to anticipate what needs to be done, and to take proactive action to solve problems and ensure work gets done effectively and efficiently.</p> <p>(3) Analytical Mindset. Exhibits curiosity and scepticism in work and personal life. Actively seeks explanations to improve own and others' understanding. Applies creative and critical thinking to solve problems. Values precision and accuracy in work.</p>	<p><b>0</b></p> <p>Limited evidence provided</p>	<p><b>5.0</b></p> <p>Examples of all 3 (in Writing Sample/ Supplementary Information Table)</p>	<p><b>10.0</b></p> <p>Compliant plus multiple examples over several years provided</p>
5	<p>Computer and Data Analysis Skills.</p> <p>(1) Intermediate level in core software MS Word, MS Excel and MS PowerPoint.</p> <p>(2) Demonstrated use of advanced functions of specialist software in a research/analysis project e.g. MaxQDA/Nivo, R/Python, Excel VBA.</p>	<p><b>0</b></p> <p>Not evident</p>	<p><b>5.0</b></p> <p>Core software (1) skills evident</p>	<p><b>10.0</b></p> <p>Compliant plus examples of using specialist software advanced functions</p>
	<b>Total</b>	<b>0</b>	<b>50</b>	<b>100</b>

<sup>[1]</sup> A score of "0" in any of the criteria categories will result in the bidder's proposal as being "Technically Non-Compliant."

<sup>[2]</sup> The compliant score is 50% of the maximum score that can be given in the case that bidder's proposal exceed the requirements. Only zero, 50% or 100% can be scored.

**NATO UNCLASSIFIED**  
 Analysis Support Services  
**LESSONS LEARNED ANALYSIS PROJECTS**

**Supplementary Information Table**

Serial	Technical Requirement	Supplementary Information Describe briefly how the bid meets the requirements set out in Technical Grading Matrix – do NOT only refer to CV/resume.
1	Qualifications and Relevant Work Experience. (1) Master degree in Applied Sciences, Social/Political Sciences, Natural Sciences, or History, or 6 years' relevant (see Serial 1 (2)) work experience. (2) At least 3 years' work experience employed as a researcher/analyst (not manager) working in project teams (not independently) for a recognized research/analysis organization. (3) Demonstrated track record of successfully applying quantitative <u>and</u> qualitative research methods in customer-focussed research projects.	
2	Language/Writing/Communication Skills. (1) <a href="#">English Language</a> Advanced (V)/SLP4444/Common European Framework C1 level (2) Writing sample (400-500 words own writing in English), meets quality standards for written work. (3) Demonstrated track record of successfully presenting results of research/analysis to military audiences up to senior levels in reports and/or presentations.	
3	Knowledge/Understanding. (1) Military HQs. Knowledge and understanding of military activities in strategic, operational and/or single service HQs gained by working for or with military in these HQs, or in-depth study of activity of these HQs. (2) NATO Military. Knowledge and understanding of NATO Military concepts, structures and doctrine from experience or in-depth study. (3) Subject Matter Expertise. Experience, study or training in any of the following topics: Russia's War Against Ukraine, especially drone warfare, Electromagnetic Warfare integration in Joint Fires and Effects, NATO Training Mission Iraq, Cyber Domain Operations, Realistic Exercise Design and Delivery.	
4	Personal Attributes. (1) Teamwork. Excellent interpersonal skills. Ability and desire to work with others. Flexibility and willingness to work in a leading or supporting role as the situation requires. Manages own work and time to coordinate with the team. (2) Initiative. Able and keen to anticipate what needs to be done, and to take proactive action to solve problems and ensure work gets done effectively and efficiently. (3) Analytical Mindset. Exhibits curiosity and scepticism in work and personal life. Actively seeks explanations to improve own and others' understanding. Applies creative and critical thinking to solve problems. Values precision and accuracy in work.	
5	Computer and Data Analysis Skills. (1) Intermediate level in core software MS Word, MS Excel and MS PowerPoint. (2) Demonstrated use of advanced functions of specialist software in a research/analysis project e.g. MaxQDA/Nivo, R/Python, Excel VBA.	