

STATEMENT OF WORK (SOW)

Administrative, Analysis, and Reporting Support Services to NATO Lessons Learned Conference 2026 (NLLC26)

1) INTRODUCTION

- a) The Joint Analysis and Lessons Learned Centre (JALLC) is a NATO organisation located in Lisbon, Portugal. JALLC is the lead agent for the collection and sharing of lessons, accomplished through active content management of the NATO Lessons Learned (LL) Portal, Joint Analysis (as an integral part of the Lessons Learned Process) and outreach to Allies and Partners. NATO LL Conference (NLLC) is a significant event contributing to collection and sharing of lessons and LL staff networking.
- b) The LL Management Division is the JALLC organizational element leading the planning and execution of the next NLLC. For NLLC in 2026 (NLLC26), LL Management Division appointed a staff member as Officer of Primary Responsibility (OPR) and Project Officer (PROJO) to lead the tasks associated to the planning and execution of the NLLC26.
- c) The JALLC is looking for a Contractor to support the NLLC26 OPR/PROJO in conducting administrative, analysis, and reporting tasks associated to the NLLC26, during 01 June – 31 October 2026;
- d) The Contractor will work in a multinational military/civilian staff environment, and will be integrated in the LL Management Division.

2) BACKGROUND

- a) Since 2003, the JALLC has hosted the NATO Lessons Learned Conference and the JALLC will plan and execute the NLLC26 as an in-person event with all participants on-site, at the conference venue. Although is difficult to estimate, 150 – 250 participants are expected to attend the event. An online platform will be used for user registration and management as well as for interaction and idea sharing during the conference conduct. The NLLC26 will include individual presentations and panel presentations and discussions.
- b) Planning and hosting an event of such magnitude requires a different workload distribution with a greater emphasis on an analysis of the conference content and reporting efforts to subsequently evaluate the conference outcomes. Additionally, it requires to prepare, update, and operate the NLLC26 platform. These activities exceed the OPR/PROJO and planning team's capabilities, who will also be involved with their routine work and other priorities (e.g. periodic reports; training programs).

3) RATIONAL

In order to create sufficient capacity to address the workload associated to the planning and execution of the NLLC26 as well as to conduct sufficient research and analysis in support of the NLLC26 reporting, it is necessary to temporarily reinforce the NLLC26 OPR/PROJO LLMD with additional human resources. As such, the LLMD requires contractor support to fulfil the tasks described in this Statement of Work (SoW).

4) TASKING AND DELIVERABLES

4.1 The contractor shall provide support to the NLLC26 OPR/PROJO and execute tasks, in accordance with this Statement of Work (SOW), within the following activities:

- a) **Administrative and clerical:** information management and preparation of the NLLC26 platform; support the registration of participants; printing; meeting preparation; record of decisions; interaction with NLLC26 participants; interaction with panel members; activities within NLLC26 platform during the planning and execution days; assist in executing the NLLC26;
- b) **Analysis:** data collection (including capturing the ideas and discussions resulting from the interactions in plenary sessions, panel discussions, and within the NLLC26 platform); contribute to and conduct data analysis; provide data visualization; formulate findings, conclusions, and recommendations; map findings with Roadmaps and synchronization matrixes (existing or proposed by the Contractor);
- c) **Reporting:** provide notes; draft articles; draft flash reports; and the NLLC26 follow-up reports;
- d) **Record of decisions** and engagement with JALLC leadership to determine the means and ways to implement these decisions as well as to engage with relevant JALLC staff for implementing actions;
- e) **Review and track the application** of personnel to confirm they meet the security requirements for the conference;
- f) **Facilitate various sessions / meetings / WS** during the NLLC26 pre-/post-conference day;
- g) The deliverables associated with these tasks will be defined by the NLLC26 OPR/PROJO-LLMD when tasking the Contractor.

4.2 The tasks and deliverables listed above are intended only as general illustrations of the various types of work that may be performed. Specific statements of duties not included in this document do not prevent them to be performed by the Contractor when the nature of work is similar, related, or a logical assignment to this function.

5) ELIGIBILITY & QUALIFICATIONS

5.1 Eligibility

- a) To be a national of a NATO member nation (provide written evidence: Passport, ID Card or other valid document);
- b) NATO Security Clearance at NATO Secret level, existing or under delivery, valid for the entire contracting period;
- c) Provision a writing sample of a full report or an extract [between 500-800 words];
- d) Confirmation of the availability to start on 01 June 2026 or state the earliest alternative date of availability to start, being 15 June the latest day for onboarding.

The Contractor is expected to have the following qualifications:

5.2 Essential Qualifications

5.2.1 Professional Experience:

- Experience in NATO environment, preferably working with the military, or multinational military environment (i.e. International relations / National Military HQs);
- Excellent analysis skills obtained through study, training, or experience;
- Excellent writing and English language skills obtained through study, training, or experience;
- Experience in writing reports after large conferences or military events;
- Considerable knowledge of and experience with computer applications, particularly word processing, desktop publishing, and graphics applications (e.g. Microsoft Office Suite);
- Excellent project and time management skills and the ability to work independently and as a team player;
- Excellent inter-personal and communication skills;
- Experience in writing, editing, and/or critically reviewing academic and/or analytical style written products;
- Previous experience in using and managing online conference platforms;
- Previous experience with conference planning and supporting panel discussions and presentations.

5.2.2 Education/Training

- At least a recognized university degree in Applied Sciences, Social/Political Sciences, Natural Sciences, History or military equivalent and 6-month work experience.

5.2.3 Security clearance

- The work under this contract will be up to the NATO Secret level so that holding a NATO Security Clearance is an essential requirement.

5.2.4 Language

- Demonstrated proficiency in English with an English Standard Language Proficiency (SLP) of 3-3-3-3 (listening/speaking/reading/writing) according to NATO's Standardization Agreement (STANAG) 6001 (Edition 5), 11 December 2014 or C1 level according to Common European Framework Language.

5.2.5 Computer Skills

- Ability to use computers and related software for word processing, presentation/graphic tasks, relevant analysis tools. At a minimum, the Contractor must be proficient in the applications of the MS Office Suite. It is also required the ability to use online applications for conducting surveys, live polls, and ideas sharing.

5.3 Desirable Qualifications

a) Professional Experience:

- Formal training or relevant job experience as a writer of reports with political, military, legal, and/or scientific relevance;
- Previous experience in data collection and analysis within a political and/or military framework;
- Experience in working with LL in organization or project environment;
- Previous experience in writing and editing NATO written products;

- Working knowledge of military/defence (preferably NATO) terminology;
 - Familiarity with planning procedures and project management methods.
- b) Computer Skills
- Ability to use computers and related software for database and spreadsheet development as well as visualizations tools.

6) CONTRACT PERFORMANCE REQUIREMENTS and REPORTING

6.1 Supervision

- a) The Contractor shall report to, and receive technical guidance from the NLLC26 OPR/PROJO, or his delegated representative, who will serve as the Contracting Officer Technical Representative (**COTR**). The COTR (or designated representative) shall provide direction, coordination, guidance, and support information, as needed, for all technical and content areas of the SOW. The COTR shall:
- Resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the SOW.
 - Review (and approve) the Contractor tasking and deliverables for completeness and accuracy.
 - Approve all Contractor work hours (monthly). This will normally take place by signing off the Contractor's monthly timesheet.
- b) The COTR shall have daily interaction with the Contractor and can assess the quality, quantity, and timeliness of their work. He shall review the Contractor's work on a minimum of a weekly basis, or more often if needed. The COTR's written approval of work performed is mandatory for Contractor invoices to be successfully processed.

6.2 Contractor Reporting

- a) The Contractor shall submit to the COTR a monthly timesheet showing the number of hours worked in the month.
- b) The Contractor Personnel Timesheet Template is included as Enclosure (1) to this SOW.
- c) 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.

6.3 Additional Contractor Requirements

- a) The COTR (or designated representative) may identify missing, erroneous, or unneeded requirements and tasking. The Contractor is expected to work closely with other team members and designated JALLC personnel. Consequently, the Contractor is expected to promptly address any identified problem and/or deficiency, providing the COTR with recommendations on how the problem could be corrected as well as any impact the recommendations may have on on-going work.

7) TYPE OF CONTRACT AND PERIOD OF PERFORMANCE

7.1 Type of Contract

- a) Contract Type. This is a **Firm Fixed Price – Level of Effort (LoE) Contract**, in accordance with the JALLC General Terms and Conditions; Contract Award is contingent upon funding availability.
- b) Under this type of contract, the contractor is required to provide 103 person-day of service (824 hours equivalent) within the stated Period of Performance, which is considered to be the minimum effort required to complete the services stipulated herein. The product of this contract shall be assessed monthly, showing the “level of effort” results achieved during a stated period, in accordance with the “Monthly Time Sheet” template in **Enclosure I**.

7.2 Period of Performance

- a) Period of Performance: 103 Working Days of Level of Effort, starting from 01 June 2026 (desirable contract starting date) or upon contract award date onwards, being **15 June the latest onboarding date**.
Estimated period of performance: 01 June 2026 to 31 October 2026.
- b) The services requested under this SOW covers the period presented in the table below;

Table 1 – Estimated Working Schedule

June 2026	July 2026	August 2026	September 2026	October 2026		TOTAL
01-30	01 - 31	01 - 31	01 - 30	01 - 31		
19 days	23 days	20 days	22 days	21 days		103 WDs

- c) During this period, some days may be declared by the NLLC26 OPR/PROJO and **COTR** as non-working days considering various factors (e.g. JALLC holidays; external stakeholders’ availability). The number of working hours for these days shall be performed in compensation out of working hours as determined by the NLLC26 OPR/PROJO and **COTR** based on priorities and deadlines.
- d) If not performed, the payment for these hours /days will be discounted from the monthly invoice.

8) WORKING HOURS

- a) An average of 8 hours / day, from Monday to Friday, normally between 07:30h to 17:30h. However, there will be days requiring working outside these hours given the interaction with stakeholders across different time zones.
- b) Working outside the normal working hours shall not entitle the Contractor to financial compensation on top of the agreed fee before covering the total contracted number of working hours’ equivalent for the period of performance.

9) PLACE OF PERFORMANCE

a) The Contractor shall perform his/her activities in person at the JALLC's offices at Avenida Tenente Martins, 1500-589 Lisbon, Portugal, for most of the Period. Exceptionally, in case host nation regulations or JALLC temporary measures impose, some of the work can be conducted remotely after coordination with and agreement of the NLLC26 OPR and **COTR**.

10) SECURITY CLEARANCE

- a) The Contractor shall be responsible for obtaining all needed security clearances effective as of the first day of the Period of Performance. If required, the JALLC may sponsor the security clearance request. The Contractor shall have at a minimum a NATO SECRET level security clearance for the duration of the Period of Performance of services at the JALLC facility in Lisbon. No clearance or waiver to this requirement shall be granted; no Contractor shall be assigned without having the needed clearance in place.
- b) If the contractor cannot assign personnel (whenever applicable), with the required NATO SECRET security clearance on the start date, the contractor shall be liable for bid non-compliance or immediate contract termination. The contractor must provide advance written proof of the ability to assign fully cleared personnel prior to contract award/start. The contractor is fully responsible for arranging all work visas, if required.
- c) Each submission in response to this solicitation shall be evaluated using the **Lowest Price Technically Compliant (LPTC) Procurement Method**, as outlined in this Statement of Work (SoW). To be eligible for evaluation, submissions must be complete and compliant with the Eligibility Checklist provided in Annex A.

11) FURNISHED MATERIALS AND SERVICES

The JALLC will provide the Contractor with:

- a) A work desk with access to NATO Unclassified and NATO Secret.
- b) JALLC Staff will provide administrative assistance within existing means and capabilities according to overarching priorities.

12) CODE OF CONDUCT AND OWNERSHIP OF WORK

- a) The Contractor shall comply with the JALLC's Standard Operating Procedures (SOP) when conducting work.
- b) The Contractor should adhere to the work practices driven by potential sanitary or security preventive measures. Failure to perform duties due to enforced quarantine or sickness arising from a situation where the Contractor acted outside the rules and spirit of the Portuguese government and JALLC's preventive restrictions will result in non-payment for those hours.
- c) All JALLC written and work-related products, furnished property, and non-expendable supplies purchased under this contract shall be, and shall remain, the JALLC's property. No copy-rights could be claimed by the Contractor but *contribution references* could be made to the written products.

13) NON-COMPLIANCE

JALLC reserves the right to refuse services and to remove from the Contract any individual provided by the Contractor (independent contractor or company personnel), due to poor performance, misconduct, security breaches, or if found to be or suspected to be under the influence of alcohol, drugs, or other incapacitating agent or any other reason based on a failure to satisfy the requirements of this SOW. The Contractor shall remove immediately the personnel from performing under this Contract upon notification by the Contracting Officer. Once the Contractor is notified that a particular individual has been disqualified, the Contractor shall not provide services of such person in any JALLC function, unless reinstatement is granted by the Contracting Officer.

14) CONTRACTOR STATUS

The Contractor's status shall be that of a firm or an independent Contractor and it is expressly understood that the Contractor (and/ or its personnel) shall not be considered in any respect as being employees, servants, or agents of NATO.

15) POINT OF CONTACT

14.1 All questions concerning the work requirement, schedule and coordination shall be referred to the appointed COTR:

- a) Designated **COTR**: (OF 4/ITA) Damiano D'ANGELO, NLLC26 OPR
- b) Designated **Deputy COTR**: (NIC/A-2) Ignacio FONSECA, NLLC26 Coordinator

14.2 In case of any contractual matters the Contractor shall contact the Contracting Officer or the designated person by the Contracting Officer and its direct POC in the JALLC:

- a) Designated **Contracting Officer**:
 - a. Rank, name and surname: (NIC /B5) - Mr. Andre Grenho
 - b. Email: andre.grenho@nato.int

16) 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.

- 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.

17) GENERAL CONTRACT 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.

ENCLOSURE I

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	Total LoE days provided (days, automatically calculated = hours/8)	0.000

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

3.1 Certification of work (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.			
3.2 Assessment of work (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.			
3.3 Acceptance of work (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.			

Eligibility Checklist

**Table 1
Administrative, Analysis, and Reporting Support Services to NLLC26 OPR/PROJO**

SERIAL	PASS/ FAIL CRITERIA ITEMS	COMPLIANT	
		Y	N
1	Acknowledgment of Receipt and Acceptance of invitation to Bid		
2	Bids submitted on time (Deadline 29 MAY 2026, 16:00 HRS, Lisbon Time, Portugal)		
3	Enclosure 1 – Completed Eligibility Checklist		
4	Enclosure 2 - Proof the bidder is a national (independent contractors) / established (companies), in a NATO member nation; and licensed contractor in the required field and legally authorized to operate in Portugal.		
5	Enclosure 3 – Proof of active NATO Secret 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.		
6	Enclosure 4 - Bidder's Contact Details		
7	Enclosure 5 – Assurance of availability to provide the deliverables required at the JALLC in Lisbon, Portugal during Normal Working Hours during the Period of Performance. Indication of any periods of limited availability, or limited ability to travel during the Period of Performance.		
8	Enclosure 6 - Price Proposal (Package 2)		
9	Enclosure 7 - Technical Documentation (CV, Diplomas, Certificates, other supporting documentation), Past Performance, Writing Sample min. 500 – max. 800 words		