

IFIB-ACT-SACT-10-02 Contractor Support for Operational
Experimentation on Behalf of HQ SACT



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

Description of Acquisition

Part 1 Bidding Instructions

IFIB-ACT-SACT-10-02

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Experimentation on Behalf of HQ SACT

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PART 1 BIDDING INSTRUCTIONS

1. General.

This is a Services & Goods Deliverable contract for the supply of Contractor Support for Operational Experimentation on Behalf of HQ SACT

2. Classification.

This RFP is a NATO UNCLASSIFIED document.

3. Definitions

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

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- (j) The term "Habitual Residence", means HQ SACT, Norfolk, Virginia, VA 23511.

3. Eligibility.

This IFIB is open to companies:

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

4. Duration of Contract

- (a) The contract awarded shall be effective upon date of award.

5. Exemption of taxes.

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

6. 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,

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that no costs shall be recovered from HQ SACT. If this IFIB is cancelled any/all received bids shall be returned unopened, per the bidder's request.

7. Clarifications.

(a) Prospective Bidders should seek clarification at their earliest convenience. Any explanation regarding the meaning or interpretation of this IFIB, terms, clause, provision or specifications, shall be requested in writing, from the Contracting Officer. The Contracting Officer must receive such requests for clarification no later than 3 calendar days prior to the bid closing date.

(b) Information in response to a request for clarification to a prospective bidder shall be furnished to all prospective bidders as a Question and Answer amendment. All such amendments shall be incorporated into this IFIB. Oral Interpretations shall not be binding.

8. Bid closing date.

(a) Bids shall be received at HQ SACT, Purchasing and Contracting Office, no later than 13 July 2010, 1200 hours, Eastern Standard Time, Norfolk, Virginia, USA. No bids shall be accepted after this time and date.

9. Bid Validity.

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

(b) Content of Proposal.

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The proposal shall consist of the following minimum paper documents and electronic media;

- (a) A table of contents for the entire proposal (See checklist provided as Enclosure # 1);
- (b) The bidders full name address, Point of Contacts, Telephone, Fax number and Internet site, (See Enclosure 2);
- (c) Compliance statement (See Enclosure # 3);
- (d) Provision of administrative, financial and technical volumes including scoring criteria, (See Annex A to Statement of work).
- (e) Past performance (See Enclosure #5)
- (f) Company Price proposal, including (Enclosure # 4)
- (g) A CD Rom containing an electronic copy of all documentation as requested above.(Note, there is not a price proposal included)
- (h) Appropriate technical and financial information to determine whether proposed services, terms and conditions comply with all the requirements of this IFIB.

(c) Proposal Submission.

- (a) Proposals shall be submitted in a single package containing two volumes, Technical volume and Price volume, each separately sealed. The single package shall be clearly marked with the mailing label, citing the IFIB Solicitation reference number, (See Enclosure #2). Within the single package shall be the Technical and Price volumes, separately packaged and identified.
- (b) An electronic copy of the proposal, not to include the Price volume is required to the assigned Contracting Officer, prior to the established bid closing date.
- (c) Proposal packages may be made by mail, courier or hand carried.
- (d) Proposal packages must be delivered to the HQ SACT via a verifiable method or be handed to a member of the BUDFIN/Purchasing staff, who shall endorse the package with a time date and delivery official shall counter sign, as to the accuracy of the recording.
- (e) Price proposals shall be in U S Dollar currency.
- (f) Prices shall be on a Firm Fixed Price Basis Price volumes shall include any relevant discount schedule.
- (g) It is the sole responsibility of the interested company to review any Q & A that may be issued in support of this solicitation, prior to bid submission.
- (h) No oral bids or oral modifications or telephonic bids shall be considered.

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- (i) It is the ultimate responsibility prior to submission that all proposal submissions are reviewed to ensure they meet the technical and administrative specifications and that offers meet the limitations and expressed conditions.

(d) 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. All late bids shall be returned to the offering company unopened. Only if it can be unequivocally demonstrated that the late arrival of the bid package was the result of NATO staff negligence (mishandling) shall the bid be considered.
- (b) A delay in a commercial courier service does not constitute a delay by NATO or government channels.

(e) Bid Withdrawal.

- (a) 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. The proposal shall be returned unopened, at the expense of the company.

(f) Bid Evaluation.

- (a) The evaluation of bids and determination as to the responsiveness and technical adequacy or technical compliance, of the products or services requested, shall be the responsibility of HQ SACT. Such determinations shall be consistent with the evaluation criteria specified in the IFIB. HQ SACT is not responsible for any content that is not clearly identified in any proposal package.
- (b) Proposals shall be evaluated taking into consideration of the following factors;
 - Successful administrative submission of bid packages and requested Enclosures 1-5, as listed in this IFIB. (Pass/Fail).

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- Successful determination of Technical compliance. (Pass/Fail).
- Successful cost price criteria (Lowest Price Technical Compliant Offer).
- Acceptance of HQ SACT Special Terms and General Terms and Conditions.

(g) Clarifications.

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

(h) Award.

- (a) HQ SACT contemplates to award to a single source.
- (b) HQ SACT Purchasing & Contracting shall award the contract to the Bidder whose conforming proposal represents the lowest compliant offer.
- (c) HQ SACT reserves the right to negotiate minor deviations to the listed Special and General Terms and Conditions to this IFIB
- (d) Contract Award date is anticipated in the month of July 2010 with performance to begin November 2010.

(i) Communications.

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

- (j) Point of contact is;

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Experimentation on Behalf of HQ SACT

Mr. Curtis Day, R&D Contracting Officer 757-747-3856

day@act.nato.int

(b) All correspondence shall be forward to;

Purchasing & Contracting,

BUDFIN Branch,

ATTN: Mr. Curt Day

IFIB-ACT-SACT-10-02,

7857 Blandy Road, Suite 100,

Norfolk, VA, U.S.A.

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Experimentation on Behalf of HQ SACT

PROPOSAL CONTENT / CHECKLIST

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- ☐ Bidder's name, address, POC, Contact numbers, email address.
- ☐ Compliance Statement.
- ☐ Past performance (including References).
- ☐ List of Key personnel with resume.
- ☐ Technical Proposal.
- ☐ Price Proposal.(Including required format)
- ☐ Mailing label.

IFIB ACT-SACT-10-02

Enclosure 3

(The label below is to be completed by the bidder and affixed to the exterior envelope; parcel or package mailed or deliver to ACT)

SEALED BID TO IFIB ACT-SACT-10-02

(To be opened by Purchasing & Contracting only)

Sender: _____

HQ SACT

IFIB ACT-SACT-10-02

Attn: Curt Day

7857 Blandy Road, Suite 100,

Norfolk, VA 23551-2490

U.S.A

COMPLIANCE STATEMENT TO SEALED BID IFIB ACT-SACT-10-02

It is hereby stated that our company has read and understands all documentation issued as part of IFIB ACT-SACT-10-02. Our company proposal submitted in response to the referenced solicitation is fully compliant with the provisions of IFIB ACT-SACT-10-02 and the intended contract with the following exception(s); such exemptions are considered non substantial to the ACT solicitation provisions issued.

Clause

Description of Minor Deviation

(If applicable, add another page)

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 RFP 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 5

IFIB ACT-SACT-10-02 SEALED BID PRICE PROPOSAL

COMPANY NAME: ABC, Inc
ADDRESS: Street,
City, Post code

TO: Headquarters Supreme Allied Commander Transformation, (HQ SACT)

Purchasing & Contracting
Contract Awards Committee (CAC)
ATTN: Curt Day
7857 Blandy Road, Suite 100
Norfolk, VA 23551

SUBJECT: IFIB ACT-SACT-10-02 Sealed Bid Price Proposal

Please find on behalf of **Insert: Company Name** to provide HQ SACT with services (collectively referred as "ITEMS"), subject to the provisions, terms and conditions stated in IFIB ACT-SACT-10-02 and the "**Insert: Company Name** Technical proposal", submitted in accordance with solicitation provisions.

Bidder's proposal must be based on full compliance with the terms, conditions and requirements of the RFP 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.

Table one (Price proposal Summary Table)

ITEM	BASE YEAR 2011(1 JAN TO 31 DEC 2011)	OPTION YEAR 1 2012(1 JAN TO 31 DEC 2012)	OPTION YEAR 2 2013 (1 JAN- 31 DEC 2013)	OPTION YEAR 3 2014 (1 Jan -31 Dec 2014)	OPTION YEAR 4 2015 (1 JAN- 31 DEC 2015)	TOTAL ITEM CONTRACT PRICE
Contractor Support for Operational Experimentation						
	Total Cost	Total Cost	Total Cost	Total Cost	Total Cost	Total Overall Contract Price

Grand Total Contract Price \$

Bidder's proposal must be based on full compliance with the terms, conditions and requirements of the RFP 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.

Table 2(Phase in/Phase Out costs Nov-Dec 10)

ITEM	8 Nov-31 Dec 2010
Contractor Support Phase in Costs (if applicable)#	
Contractor Support: Phase out Costs (if applicable)	

Proposal must also include a complete component description list with cost breakdown.

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

Bidder's proposal must be based on full compliance with the terms, conditions and requirements of the RFP 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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Authorizing Company Official:

Printed Name: _____

Position: _____

Title: _____

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

Company name Witness Official:

Printed Name: _____

Position: _____

Title: _____

Witness Signature: _____, Date _____.

Bidder's proposal must be based on full compliance with the terms, conditions and requirements of the RFP 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 6

**REFERENCE OF SUCCESSFULLY COMPLETED CONTRACTS
SUBSTANTIALLY SIMILAR IN SIZE AND SCOPE OF IFIB ACT-
SACT-10-02**

Please find herewith for each past performance and reference the following information, in response to IFIB ACT-SACT-10-02.

1. Contract Reference Title: _____

Contract Number: _____

Contract Amount _____

Start Date _____

End Date _____

Customers Name _____

Point of Contact _____

2. Contract Reference Title: _____

Contract Number: _____

Contract Amount _____

Start Date _____

End Date _____

Customers Name _____

Point of Contact _____

3. Contract Reference Title: _____

Contract Number: _____

Contract Amount _____

Start Date _____

Contracts listed above include those entered into with the Federal Government, agencies or state and local governments, non-profit entities and/or commercial concerns. The Bidder shall include all information on problems encountered in the performance of the listed contract and or corrective actions.

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End Date

Customers Name

Point of Contact

Contracts listed above include those entered into with the Federal Government, agencies or state and local governments, non-profit entities and/or commercial concerns. The Bidder shall include all information on problems encountered in the performance of the listed contract and or corrective actions.

**Contractor Support to
Allied Command Transformation
Operational Experimentation
Statement of Work (SOW)**

*"We are NATO's leading agent for change, driving,
facilitating and advocating continuous improvements of
capabilities to enhance the military relevance
and effectiveness of the Alliance."*

March 2010

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Introduction

Scope and General Requirements

1. This statement of work (SOW) specifies the tasks that contractor personnel will be required to perform in support of the Allied Command Transformation's (ACT) Experimentation Programme. The Experimentation Programme of Work (EPOW) is run by the Operational Experimentation (OE) Branch within the Capability Engineering Division and is a key tool used in ACT's capability development campaign. Contractor personnel shall: support the planning, execution and output of Experimentation; assist in optimising the processes and standards necessary to underpin an EPOW that delivers a high quality output contributing to near and long-term capability shortfalls; integrate emerging concepts with experimentation; design experiments; assist in experiment execution and analysis; assist in integrating EPOW with other NATO and national programmes in order to realise synergies and efficiencies; assist in integrating experimentation into capability development planning.
2. Contractor personnel shall analyse and identify issues, and formulate and provide courses of action for issue resolution. They shall have a general knowledge of the NATO requirements and acquisition process, including Defence Planning and Capability Package management. In performing this SOW, contractor personnel will be required to work in a matrix management structure. Furthermore, contractor personnel may be required to interact with Allied Command Operations (ACO), subordinate commands, Nations, and NATO agencies, including the NATO Consultation, Command and Control Agency (NC3A), and others as designated.
3. The Contractor shall be responsive to evolving requirements that may necessitate adjusting the quantity and qualifications of the contractor team personnel. The Programme Manager (or authorized company representative) and the Contracting Officer's Technical Representative (COTR) shall address these changes in a formal review and reach agreement at intervals of not more than six months.
4. The period of performance for this contract will be 1 Jan to 31 Dec 2011, with four option years.
5. Contractors' responses to this SOW shall be in four divisions:
 - a. Part one - review of corporate experience and expertise, including quality assurance and reachback experience.
 - b. Part two - technical response to the taskings and deliverables in section two, including proposed staffing.
 - c. Part three - how the contractor company will meet surge requirements.
 - d. Part four - address the sample Experimentation tasks.

The Role of Concept Development & Experimentation

6. Concept Development & Execution (CD&E) supports NATO transformation by providing a structured approach for answering questions and testing and validating potential solutions before decisions are made that may affect acquisitions, or changes in policy and procedures. Experimentation provides a tool for exploring, developing, evaluating and testing new concepts that, if proven, may contribute to NATO's military transformation. In addition to conducting its own experiments, ACT achieves its mission through the leveraging of the CD&E programmes of NATO member nations, the NATO research agencies, and others. ACT employs experimentation as a transformation tool to:
 - a. Reduce uncertainty
 - b. Enable innovation and transformation
 - c. Identify and solve practical problems that cannot be determined through studies and analysis alone

- d. Help to avoid production of systems that appear promising, but that actually offer little in terms of military capability

Comprehensive Campaign Planning

7. Annually, HQ SACT assembles a Comprehensive Campaign Plan (CCPlan). The CCPlan enables NATO's senior Military Committee (MC) to oversee the ACT programme as a whole by providing a clear line leading from Nations' guidance, through SACT's strategy, to the Command's output. Through the CCPlan, ACT articulates a capability, or output-based, methodology. Multiple sub-plans, known as 5-Year Deliverable Plans, comprise the production backbone of the CCPlan. Each 5-year plan describes activities (such as experiments) which generate products that, in turn contribute to a deliverable. The deliverables address required capabilities.
8. Each experiment that is embodied within the CCPlan follows an evolutionary path. Experiments originate when staff, working on capability development within the various entities and Divisions of ACT, assisted by experimenters, identify the need for a verifiable assessment to be made to help progress towards a needed product and deliverable. A short conceptual rationale, or a fuller concept document, precedes all ACT's experimentation. This and other fundamental information is assembled in a briefing that is distributed to the Nations for consideration by their experts. National representatives then attend a CD&E Working Group (WG), hosted annually by HQ SACT, at which experiments are technically validated and, thereafter accepted for inclusion in ACT's CCPlan. Military validation of the CCPlan is subsequently conferred by the MC.
9. An important effort throughout each year, and which culminates at the CD&E WG, is the networking or joining-up of ACT's EPOW with similar programmes of the Nations. Where potential synergies are identified ACT's experimenters explore the potential for linking their experiments with those of their national counterparts in order to obtain an improved outcome for the Nations and the Alliance. Efficiencies are sought in terms of time and resource savings. Duplication of effort is also avoided.

Organisation

10. The Capability Engineering (CE) Division of HQ SACT has a role which includes CD&E. The CD&E process includes developing and tracking concepts, designing and executing experiments that assess the value-added premises of these concepts, and preparing recommendations for improvements in terms of Doctrine, Organization, Training, Materiel, Leadership, Personnel, Facilities, and Interoperability (DOTMLPFI) for integration into ACT Deliverables which, in turn, contribute to new capabilities.
11. CE Division is organised into branches whose tasks include contributions to the successful definition, planning, execution and reporting of experimentation. Contractor personnel will be members of the Operational Experimentation (OE) Branch from where they will operate in an integrating and supporting manner across ACT's business areas, providing technical expertise in experimentation to complement the contribution of the Command's military component.



Figure 1. Capability Engineering Division

12. HQ SACT employs a matrix-management organisational structure with Divisions, including CE Division, comprising the vertical component, and several Deliverable Directors providing the lateral component. By managing the 5-year Deliverables Plans described at paragraph 7 above, the Deliverable

Directors coordinate focussed effort on selected and complementary areas of NATO's transformational challenge. Ad hoc project teams may also be assembled to carry out specific tasks.

Overview of Contractor Activity

13. Contractor personnel will be familiar with the NATO Transformation tenets, the Guide for Understanding and Implementing Defence Experimentation (GUIDEx), and the annual ACT experimentation planning cycle. They will integrate their efforts with NATO military and civilian personnel and with other contractors employed by ACT. Contractors will team with military and NATO International Civilian personnel, formulate draft plans and present proposals and decision briefs to the chain of command.

14. OE Branch will seek additional support from the OE Support Contractor via time-limited surges in the contract. ACT may also obtain engineering and other technical services from other elements of industry and from NATO agencies. Such additional contract support gives ACT access to the specialised expertise required in developing and analysing specific concepts. At the direction of ACT staff, contractor personnel shall coordinate their activities with associated contractors, as is appropriate for the tasks specified in this SOW.

Attachments:

Annex A.	Evaluation Criteria and Checklist (Summary List of RFI Response Requirements*)
Annex B.	NATO Handbook**
Annex C.	HQ SACT Command Brief PPT Presentation**
Annex D.	Guide for Understanding and Implementing Defence Experimentation (GUIDEx)**
Annex E.	ACT Experiment Design Document (EDD)
Annex F.	Illustrative List of Potential ACT Experiments
Annex G.	NOT USED
Annex H.	Contractor Skillsets

* Potential contractors are encouraged to use Annex A as a reference when completing the technical response requirements as shown in the SOW. This annex summarizes the response requirements, and how they will be evaluated by the ACT technical response reviewers.

** Due to security restrictions Annexes or Annex links will be provided upon request only.

COPIES OF ANNEXES ARE AVAILABLE ON THE ACT WEBSITE OR UPON REQUEST:
www.act.nato.int

SECTION ONE

Company Experience and Expertise

Response Part 1 - Company Experience and Reachback Capability

15. Contractor companies shall submit papers of no more than 15 pages (single-spaced) text, describing in detail their expertise and past experience in delivering services outlined in the SOW Introduction. In particular, Contractor responses should address Section One items describing the processes and basic tasks needed for CD&E to be successful. These papers will be rated by how well they show that the companies can meet ACT's needs, based on their past performances.

16. As NATO is an organization of 28 sovereign Nations, there is a requirement for the successful contractor company to have past experience and a proven track record in multinational work, in particular within NATO. Contractor responses to the paper described in paragraph 14 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 contractors in a multinational team among ACT's military and NATO International Civilian components; (2) leverage a broad network of industrial partners to complement NATO's military network, thereby helping to ensure that ACT has ready access to a powerful suite of information, knowledge and understanding relevant to Alliance transformation.

17. Contractor companies shall cite their past performances based on contracts held within the last five 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 this SOW. Contractors are asked to limit each past/present performance citation to one single-sided page, and place them in an annex to the paper described in paragraph 15. The annex pages are not counted against 15-page limitation. Each past performance citation shall include the following information at a minimum:

- Contract number
- Name and phone number of a point of contact for which the contract was performed.
- Financial value of contract.
- Name of subcontractor(s) used, if any. Describe the extent and type of work the subcontractor performed.
- Were the contract performance terms met? If not describe the problem, the corrective action(s) taken and its effectiveness
- Was the contract completed on schedule? If not describe the problem, the corrective action(s) taken and its effectiveness
- Was the contract completed within cost? If not describe the problem, the corrective action(s) taken and its effectiveness

18. Each company shall describe how it will make reachback available to its contractors who may need assistance with a question or task. Do not confuse this request for reachback with the surge capability asked for in Section Three. Reachback is envisioned to be day-to-day assistance for contractors from the parent company or another organization. The reply must elaborate on and answer the following questions:

- Will on-site contractors have direct electronic access to company employees outside of the ACT contract?(see para 60)

- What areas of expertise are available from the company? For example, if an Experimenter I is unable to answer a question or solve a problem, is there a more experienced person(s) within the company to help? Who is this person(s)? The name(s) is to be included in the response.
- Will there be direct costs to ACT for daily reachback? If yes, describe them in the response, include the projected hourly rate and anticipated total cost.

19. a. Contractor companies shall prepare a paper of no more than five pages on their proposed quality assurance plan for themselves and ACT. To ensure that ACT receives the best value possible from a future contractor, there is a need for an in-place quality assurance process. Typically, quality assurance is achieved by periodic meetings and reports between the Programme Manager and COTR, cash flow statistics, etc.

b. Contractor companies shall prepare a paper of no more than four pages on their proposed transition plan with the current OE contract award holder. The paper will present their recommended approach to the handover period and include phases, specific milestones, the projected hourly rate and anticipated total cost.

SECTION TWO

Onsite Support

20. Contractor personnel shall support the following Experimentation functions: programme development and management; experimentation integration and experiment planning, design, analysis and reporting. These services shall support the execution of the in-year EPOW and assembly of future programmes as integrated components in ACT's campaign plans. The positions shown in the following list reflect ACT's proposed placement of contractors in OE supporting functions. Three competencies characterise the services to be delivered. Successful delivery will result from the provision of the expertise required in each competency and the ability to blend the output from each competency into a high quality, adaptable service. Contractor services shall include the three competency areas as further defined herein:

a) Experimentation Management Competency

- i) Experimentation programme support development and management (Experimentation Support Programme Manager I).
- ii) Experimentation projects support and resources management (Experimentation Project Manager I).
- iii) Experimentation networking to assemble diverse contributions (NATO, other allies, industry, academia) into EPOW (Experimentation Project Manager II)
- iv) Experimentation Knowledge Management (Experimentation Knowledge Manager I)

b) Experimentation Integration Competency

- i) Integrated application of experimentation to new concepts in order to improve understanding and contribute to capability development (Experiment Integrator I, Experimenter I).

c) Experimentation Competency

- i) Experiment design and execution support, linking experiments and other activities into optimised, productive campaigns (Experimenter I, Experiment Analyst I).
- ii) Experiment design, assistance with execution, data collection and post-experiment analysis (Experiment Analyst I, Experiment Analyst II, Experimenter I, Experimenter II).

Experimentation Management Competency

21. The OE Branch is the department that leads the planning, assembly, execution and post-experiment activities that comprise the EPOW. The OE Branch Head (a military officer) oversees the programme. Day-to-day programme management is carried out by the Deputy Branch Head (a NATO International Civilian).

22. To the greatest extent possible, the following activities shall be accomplished concurrently to make the maximum use of resources, and minimize costs and impact. OE Branch is responsible for the overall service delivery of high quality experimentation as a key contribution to ACT's output and will provide overall prioritization and coordination of activities performed in this work area. Contractor personnel shall provide services to accomplish the tasks specified below:

- a) Assist in the harmonisation of the EPOW with NATO's requirements and other related programmes of work, in NATO and at national level, in order to obtain maximum return on investment.
- b) Provide specialist input to conferences, seminars, and work groups supporting capability development and transformational products in order to foster understanding of CD&E and profitable business networking across the Alliance.
- c) Develop, and advise upon, the optimum experiment processes, metrics and standards necessary to provide NATO with technically valid outputs from experimentation, in order to provide actionable recommendations for decision-makers.

- d) Contribute to ACT campaign planning, which is shaped by prevailing strategic direction, lessons learned and requirements, through the identification of efficient capability development pathways which utilise experimentation to best effect.
- e) Support the continual development and delivery of an institutionalised education programme for ACT's military staff members, to provide them the CD&E skills that are essential in order to employ their military experience effectively within experimentation.
- f) Assist in administrating and archiving of the valuable information which arises from conducting experimentation and employ knowledge management practices to identify the key insights and experiences for use in informing capability development, briefing senior leaders and, through wider distribution, to NATO's CD&E community of interest.
- g) Assist in administrating and delivery of the Experimentation Integration Competency and Experimentation Competency to help ensure that valuable resources are employed efficiently.

Experimentation Integration Competency

23. The 5-Year Deliverables Plans serve as roadmaps for the development of improved capabilities. Experimentation provides an empirical means through which ACT can translate plans into actions. The Experimentation Integration role requires contractor Experiment Integrators and Experimenters to assist the Deliverable Directors and their staffs to achieve maximum progress, in accordance with their plans, through the medium of experimentation. Selected staff officers working for each Director lead particular lines of capability development. Where experimentation is required, these staff officers will advocate and sponsor the necessary experiments. These Experiment Sponsors and OE Branch's Experiment Integrators form the primary bond between capability development need and experimentation service provision. This competency makes a particularly important contribution to the functioning of ACT's matrix-managed organisation.

24. Contract personnel shall:

- a) Liaise with CE Division staff members, ACT staff officers, related programme organizations, multinational organizations, end-user personnel, other contractors, and others essential to task fulfilment.
- b) Attend and support planning meetings with Deliverable Directors and their staff, Experiment Sponsors, technical working groups, other contractor teams, and related programme organisations.
- c) Provide input to Identify core issues and key questions that can be addressed through experimentation.
- d) Draft experiment integration assessments to provide courses of action, understandable by staff with no experimentation experience, for Experiment Sponsors and other decision-makers to consider.
- e) Assist with concept-to-experiment integration including the conceptual rationale which is required to precede any ACT experiment.
- f) Assist with experiment design by providing technical advice to Experiment Sponsors who may not be experienced in defence experimentation.
- g) Assist in providing feedback to concept developers.
- h) Assist in the integration of experimentation within ACT's comprehensive campaign planning.
- i) Assist in the management of experimentation information using appropriate databases and websites.
- j) Assist in the post-experimentation reporting and handover to staff responsible for further development and/or transition to operating capability.

Experimentation Competency

25. The Experimentation Competency area comprises Experiment Design and Analysis, and Experiment Execution Support. Paragraphs 25 to 37 detail the services that the Contractor shall provide within this competency.

Experiment Design and Analysis

26. In order to assemble experiments in a disciplined manner, ACT employs an Experiment Design Document (EDD) template to help guide experimenters, Experiment Sponsors and Analysts through the steps necessary to prepare a valid experiment. The EDD, together with the associated Data Analysis Plan and Data Collection Plan are central to the skills required in the Experimentation Competency. Contractor expertise as defence experimentation practitioners is essential to enable the successful fusing of inputs, from a diverse group of contributing staff elements, into a successful experiment. These elements include, but are not limited to, the military staff officer Experimenters of OE Branch, military staff officer Experiment Sponsors, HQ SACT's Operational Analysts, and technical services providers such as NC3A.
27. Experiment analysis support is included in the Experimentation competency area. Contractors (Experimenter I, Experiment Analyst I) shall support a robust linkage between EPOW activity and ACT's Operational Analysis Branch to establish the conditions for appropriate analysis to take place in EPOW experiments.
28. Contractors (Experiment Analyst I, Experiment Analyst II, Experimenter I, Experimenter II) shall support the achievement of effective analysis by providing the technical services required to: develop experiment designs, Measures of Effectiveness (MOEs)/ Measure of performance (MOPs), data collection and analysis plans for experiments and related events; manage data collection and analysis; and draft First Impression Experiment Reports and Final Reports for each experiment/event.
29. Contract personnel shall provide support services for assigned experiments and related events to:
- Identify and track action items.
 - Draft point papers, messages, briefing materials, and other correspondence.
 - Coordinate with ACT and ACO staff members, end-user personnel, and others essential to the fulfilment of experiment objectives.
30. Contractor personnel shall analyze data from individual experiments/events and from information across multiple experiments/events to support concept development.
31. Contractor personnel shall interface with ACT's operational analysts and support the planning of experiment data collection and analysis.
32. Contractor personnel shall provide other analyses conducted by developing analytical models using desktop tools (MS Excel or others) to identify potential areas of experimentation or unfeasible experiment trials prior to executing larger constructive, virtual, or live simulations.

Experiment Execution

33. Experiment execution is the portion of the process in which experimentation is conducted; data is generated and collected/recorded, and then prepared for assessment in accordance with the specific EDD. Given the wide range of exercises, simulations, field tests, demonstrations, seminars, and externally-sponsored experiments which may comprise ACT's opportunities, a high degree of contractor flexibility is required to support the identifying, adapting, planning, and leveraging situations as they occur.
34. Contractors shall support experiment execution with services including, but not limited to: physical setup, maintenance and breakdown of the test environment, administering of experiment events, control of test and external variables, and execution of changes indicated by the experiment director during events. Key to this effort will be contractor expertise in contemporary joint operations and an expertise with the set-up and conduct of defence experimentation. This will result in contractor hands-on participation as an assistant controller, role player, facilitator, observer, data recorder, visitor coordinator, administrative assistant, or in other capacities to achieve experiment and event goals.

During experiment execution, contractors shall perform assigned responsibilities, while advising and assisting the Experiment Leader to further exploit opportunities that may arise. These include:

- a) Plan and manage experiment operations, to include developing support, training, logistics, and administrative plans.
- b) Identify and track action items, to include POA&M development, schedule generation, periodic reporting, and identification of completed actions.
- c) Provide support based on experiment event requirements that may include a simulation control cell, component control cell, MEL/MIL script control cell, white force operators, blue force operators, red team players, and opposition forces.
- d) Provide a staff capable of portraying and producing friendly and enemy forces for experiment requirements. This work shall include populating applicable databases.
- e) Provide engineering and technical services required in planning, participating, integrating and assessing experiments.

35. Upon experiment conclusion, contractor personnel shall provide configuration control: assemble, organize, and provide preliminary assessment of data and observations. Contractors will prepare immediate event feedback material, answers to inquiries, first impressions reporting, and briefings to senior officials.

Contractor Response Part 2 – Onsite Support

36. A successful contractor response to Section 2 will be based on providing the required personnel and skillsets shown in Table 1. This table details each position title, whether a resume is required, amount of hours per year needed, expected arrival date, cross reference to the applicable skillset annex/appendix, and if reachback support is required. Resumes will be required for the ten persons indicated in the table.

37. Each submitted resume must clearly show how the proposed person meets the applicable skillset, which is further defined in Annex H.

38. Contractor companies must reply to this section with a statement that they can supply all required personnel within the timelines shown in Table 1, and with the required skillsets and NATO security clearance. In addition, contractor companies must confirm in writing that they have taken all reasonable steps to ensure that the individuals selected for the key positions will remain in the positions for a minimum of six months. The table in the evaluation portion must be filled in with the names of the primary reachback contact for each of the positions. Any changes in personnel shall be coordinated in advance with the COTR. Any proposed changes in personnel shall, as a minimum, be fully compliant with the technical requirements for the specific labor category outlined in the Statement of Work.

39. Contractors will include a detailed schedule showing key contractor dates (personnel arrival, review sessions, etc) from contract award until 31 Dec 2011.

40. For budget purposes, the estimated hours for full-time personnel for the period of performance in calendar year 2011 are 1800 hours.

Table 1. Required Personnel and Skillsets						
#	Title	Resume Required	Expected Hours	On Site Date*	Skillset Annex H	Reach back
1	Experimentation Programme Support Manager I	Yes	1800	From 8 Nov 10	Append 1	Yes
2	Experimentation Project Manager I	Yes	1800	From 8 Nov 10	Append 2	Yes
3	Experimentation Project Manager II		1800	From 8 Nov 10	Append 3	Yes
4	Experiment Integrator I	Yes	1800	From 15 Nov 10	Append 4	Yes
5	Experiment Integrator I	Yes	1800	From 15 Nov 10	Append 4	Yes
6	Experiment Integrator I	Yes	1800	From 29 Nov 10	Append 4	Yes
7	Experiment Integrator I	Yes	1800	From 29 Nov 10	Append 4	Yes
8	Experimenter I	Yes	1800	From 15 Nov 10	Append 5	Yes
9	Experimenter I	Yes	1800	From 15 Nov 10	Append 5	Yes
10	Experimenter I	Yes	1800	From 15 Nov 10	Append 5	Yes
11	Experimenter II		1800	From 3 Jan 11	Append 6	Yes
12	Experimenter II		1800	From 3 Jan 11	Append 6	Yes
13	Experimenter II		1800	From 3 Jan 11	Append 6	Yes
14	Experiment Analyst I	Yes	1800	From 8 Nov 10	Append 7	Yes
15	Experiment Analyst II		1800	From 3 Jan 11	Append 8	Yes
16	Experiment Analyst II		1800	From 3 Jan 11	Append 8	Yes
17	Experimentation Knowledge Manager		1800	From 29 Nov 10	Append 9	Yes

* Note: On site dates are for general guidance only to account for a handover/takeover period between the incumbent contractor and a new contractor. Exact periods of the phase-in will be addressed after contract award and will depend upon several factors including the 2010 funds available for a handover period when two contractor companies would be overlapping on site.

SECTION THREE

Surge Capability

Basic Tasks for Surge Capability

41. The exploratory nature of defence experimentation confers a requirement for a highly responsive and agile enabling organisation. The surge capability requirement is included to ensure that a contract vehicle is in place should emerging circumstances require a quick and temporary increase in contractor personnel with specific skillsets. The Contractor Company shall be prepared to provide support services in the following Experimentation functional areas: Comprehensive Approach; Information Technology; and Major Experiment Event Support. The task list shown below provides further details on likely surge tasks. Contractor support surge capability shall, as a minimum, include these areas as defined herein:

- a) Comprehensive Approach: In order to enhance cooperation with external actors, NATO is actively pursuing extensive civil-military interaction with other relevant organizations and actors. This initiative is supported by an enduring campaign of Civil-Military Interaction (CMI) capability development, including experimentation. CMI surge capabilities shall include the following:
 - i) Knowledge Manager I
 - ii) Knowledge Manager II
 - iii) Knowledge Manager III
 - iv) Technical Knowledge Manager III
 - v) Knowledge Manager IV
 - vi) Knowledge Manager V
 - vii) Associate Knowledge Manager V
- b) Information Technology: Working alongside the NATO's Communication and Information Systems Services Agency (NCSA), contractor surge support shall include the following:
 - i) Information Technology Associate
 - ii) Advanced Technology Engineer
 - iii) Senior Computer/Software Engineer
 - iv) Technology Engineer/Analyst
 - v) Junior Technology Engineer/Analyst
- c) Major Experiment Event Support: Additional Experimenters and Analysts to support a major experiment event or concurrent execution of multiple experiments. Contractor surge support shall include the following:
 - i) Additional Experimenter I
 - ii) Additional Analyst I
 - iii) Additional Experimenter II
 - iv) Additional Analyst II

Response to Section 3 –Surge Capability

42. A successful contractor response to Section 3 will be based on the required personnel and skillsets described in Table 2. This table details the position title, amount of hours per year anticipated, expected arrival date, number of times expected to be called out each year, cross-reference to the skillset annex/appendix, and whether reachback is required. It is anticipated that some surge tasks will require specific expertise. In such cases, specific personnel requirements will be detailed in the proposal.

43. Contractors must reply to this section with a statement that they can supply all of the required personnel within the timelines given, and the personnel to be provided have the applicable skillsets and NATO security clearance. The table in the evaluation portion must be filled in with the names of the primary reachback contact

for each position. It should be noted that, by their very nature, surge tasks may be in response to unforeseen circumstances. The table which follows offers broad guidance only.

Table 2. Required Surge Personnel and Skillsets				
#	Title	On Site Date	Skillset Annex H	Reachback
1	Knowledge Manager I	20 working days after request to PM	Append 15	No
2	Knowledge Manager II	20 working days after request to PM	Append 16	No
3	Knowledge Manager III	20 working days after request to PM	Append 17	No
4	Tech Knowledge Manager III	20 working days after request to PM	Append 18	No
5	Knowledge Manager IV	20 working days after request to PM	Append 19	No
6	Knowledge Manager V	20 working days after request to PM	Append 20	No
7	Associate Knowledge Manager V	20 working days after request to PM	Append 21	No
8	Information Technology Associate	20 working days after request to PM	Append 10	Yes
9	Advanced Technology Engineer	20 working days after request to PM	Append 11	Yes
10	Senior Computer/Software Engineer	20 working days after request to PM	Append 12	Yes
11	Technology Engineer/Analyst	20 working days after request to PM	Append 13	Yes
12	Junior Technology Engineer/Analyst	20 working days after request to PM	Append 14	Yes
13	Experimenter I	20 working days after request to PM	Append 5	Yes
14	Experiment Analyst I	20 working days after request to PM	Append 7	Yes
15	Experimenter II	20 working days after request to PM	Append 6	Yes
16	Experimenter II	20 working days after request to PM	Append 6	Yes
17	Experiment Analyst II	20 working days after request to PM	Append 8	Yes
18	Experiment Analyst II	20 working days after request to PM	Append 8	Yes

SECTION FOUR

Demonstration of Knowledge and Expertise

SECTION FOUR

Demonstration of Knowledge and Expertise

Response to Section 4 – Demonstration of Knowledge and Expertise

1. In this section, contractor companies will demonstrate their knowledge of Operational Experimentation support by completing two tasks, drawing upon the source documents provided where necessary. In the first task contractors will show how they would advise in designing an experiment. The second task gives contractors the opportunity to show how they would recommend employing experimentation in a capability development campaign.

Task 1

2. In the period 1 to 30 July 2011 ACT will host a scenario-based symposium on countering the threat posed by Improvised Explosive Devices. The current plan is to run a Counter-IED (CIED) validation experiment concurrent to the symposium so that attendees can see experimentation in action. The experiment would use the existing scenario and validate new NATO C-IED C2 TTPs and IT tools. In 2010 a previous limited objective experiment employed the TTPs and IT tools in the hands of contractors. The Operational Experimentation Branch Head has been deployed and his staff officers are concentrating on other high priority projects. The task of developing an outline plan for the CIED C2 TTP and IT tools validation experiment falls to you. You carry out a quick review of the experiment documents and correspondence. Although a few of the experiment audience will not have employed the TTPs before, all personnel have recent operational experience. NC3A is confident of providing the new operational standard IT tool suite needed in time for the start of the experiment and there is the added prospect of software updates becoming available during the experiment. The ACT sponsor of the IT tools is also keen to see an early prototype next-generation tool from the R&D programme employed, although nations have not yet agreed on the operational need for the functionality this tool offers. ACT senior leaders are pleased to note that the experiment will be further enriched by the opportunity, via US JFCOM, to include force elements from some non-NATO nations who would like to participate to validate their C-IED national tactics and procedures.
3. Contractor Task. In a paper of four pages or less, your task is to:
 - a. Produce a paper to brief your outline plan for the CIED C2 TTPs and IT Tools experiment to the Branch Head on his return from deployment.
 - b. Identify and explain at least six facts in this task, using the information above, which should concern the experimenter.

Task 2

4. ACT Joint Deployment & Sustainment (JD&S) staff have experienced a higher than normal turnover in their military staff members. Coincidentally, project issues have just recently arisen within the JD&S deliverable programme. For example, the JD&S planning tool R&D project is ahead of schedule and shows a minor underspend. There is a potential opportunity to bring forward the planning and execution of experimentation with a concept prototype. ACOS Capability Engineering wants to help ACOS JD&S in understanding the project management considerations and the benefits that experimentation can deliver in refining and validating the prototype.

5. Contractor Task. In a paper of four pages or less, your task is to:
 - a. Prepare a paper for ACOS Capability Engineering to use.
 - b. List and explain at least six PRINCE 2 project management considerations that you would address in analysing the impact of the latest news.
 - c. Explain at least two benefits of experimentation during the refinement and validation of the prototype.

SECTION FIVE

Contractor Requirements

Points of Contact for Contractors

6. Contractor personnel shall report to and receive guidance from the (the Contracting Officer's Technical Representative (COTR), or Designated Alternate COTR. The Branch Heads or designated supervisor shall provide direction, guidance, access to subject matter experts (SME), and support information, as needed, for all technical and content areas of the SOW, especially the tasking and deliverables. The COTR shall resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the SOW. The COTR can recommend to the Contracting Officer (who has final authority) that the contract/SOW be amended, extended, or cancelled for evolving requirements, new tasking, and/or technical non-performance.

The COTR shall review the Contractor's work at a minimum of monthly, or more often if needed. The COTR's written approval of work reported and deliverables submitted is mandatory for Contractor invoices to be successfully processed.

Contractor Reporting

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

- Name(s) of Contractor personnel assigned to work.
- Summary of work completed during reporting period.
- Contract hours expended showing a comparison with budgeted hours.
- Tasking and deliverables met for reporting month.
- Interim tasking and deliverables met for the reporting month.
- Tasking and deliverables (interim and final) to be met for the coming month.
- Current or anticipated problems/deficiencies and recommended solutions.

The COTR may 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. However, note that the report is NOT a deliverable subject to acceptance. The Contractor is expected to work closely with other team members, SMEs, and designated HQ SACT personnel. Consequently, the Contractor is expected to promptly address all identified problems and deficiencies, providing the COTR with written information on how the problem shall be corrected and any impact to on-going work.

The COTR may 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. However, note that the report is NOT a deliverable subject to acceptance. The Contractor is expected to work closely with other team members, SMEs, and designated HQ SACT personnel. Consequently, the Contractor is expected to promptly address all identified problems and deficiencies, providing the COTR with written information on how the problem shall be corrected and any impact to on-going work.

Additional Contractor Requirements

8. The COTR or Designated Alternate COTR shall identify missing, erroneous, or unneeded requirements and tasking. Contractors are expected to work closely with other team members, SMEs, designated HQ SACT

personnel. Consequently, Contractors are expected to promptly address an identified problem/deficiency, providing the COTR with information on how the problem shall be corrected and any impact to on-going work.

Type of Contract

9. This is a firm fixed price, level of effort contract.

Period of Performance

10. The period of performance is from 1 Jan – 31 Dec 2011, with four option years.

Contractor Technical Evaluation.

56. Contractor Supervision. Contractor personnel shall report to and receive technical guidance from the COTR while executing this SOW. The COTR can recommend to the Contracting Officer (who has final authority) that the contract/SOW be amended, extended, or cancelled for evolving requirements, new tasking, and/or technical non-performance. The COTR shall provide direction, guidance, access to subject matter experts (SME), and support information, as needed (within scope). The COTR shall;

- Resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the SOW, and,
- Review (and approve) all contractor tasking and deliverables for completeness and accuracy.
- 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.

57. Rights in Technical Data Computer Software.

Specific information to IPR is articulated in the General Terms and Conditions that support this contract. Ref: ACT-SACT General Terms & Conditions, clause # 33.

58. Releasability. NATO nations have regulations and laws applying to the export of defense related goods by domestic commercial sources to outside entities (such as NATO). The products or services under this SOW will need to be releasable to entities identified under the statements made with regard to both the Intellectual Property Rights and any applicable export control laws, Ref; ACT-SACT- General Terms & Conditions, clause #21 and paragraph 61 below.

59. Furnished Materials

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

60. Security

a. Personnel Clearances

Contractor personnel shall be responsible for obtaining all needed security clearances prior to starting work at HQ SACT. All Contractors shall have a minimum of a SECRET security clearance (as issued by NATO or the respective national Department of Defense (DoD)). No clearance or waiver to this requirement shall be granted, and no Contractor shall be assigned without having the needed clearance in place. If the Contractor Company cannot assign personnel with the required SECRET security clearance on the start date, the company shall be liable for bid non-compliance or immediate contract termination. The Contractor Company must provide advance written proof of the ability to assign fully cleared personnel prior to contract award/start. The Contractor Company is fully responsible for arranging all work visas.

- **Security Conditions**

The Contractors must adhere to current security conditions at HQ SACT and other work sites. Contractor personnel shall comply with all local host nation, NATO security provisions and other policies and procedures, as required. The possible security classification of the deliverables under this contract may range from unclassified through NATO Secret.

- **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 facility. The Contractor Company shall submit requests for site access to SACT HQ, Attention Security Office, and 7857 Blandy Road, Suite 100, Norfolk, VA 23551-2490.

- **Electronic Devices**

All Contractor personnel 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 satisfying the necessary clearance from the HQ SACT Security Office before bringing any such device into the HQ SACT work environment.

61. Export Control

NATO nations have regulations and laws applying to the export of defense related goods/ services originating from domestic commercial sources to foreign entities. Usually under those laws and regulations, NATO is considered a foreign entity. The following requirements of this statement of work are provided in order to allow the bidder/contractor the opportunity to assess the applicability of their pertinent national laws and regulations and take action, as required, (Reference, Part One A, Special Terms & Conditions). The services provided under this statement of work support generic administrative support to Operational Experimentation activities. The services will be rendered at a maximum in the following locations: NATO member Nations and future NATO member Nations. Persons exposed to the services performed under this SOW will be nationals of NATO member Nations working for NATO Nation Governments.

SECTION SIX

General Contract Terms and Conditions –Rev 12/09

Special Contract Terms and Conditions -10/08

PROVIDED SEPARATELY

NATO UNCLASSIFIED

HQ SACT General Contract Terms and Conditions

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NATO UNCLASSIFIED

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

a. "HQ SACT" means the Supreme Headquarters Allied Command Transformation, located at 7857, Blandy Road, Suite 100, Norfolk, Virginia, United States of America.

b. Contracting Officer means the person executing and managing this contract on behalf of HQ SACT.

c. Inspector means a person appointed by the Contracting Officer for the purpose of determining compliance with the technical requirements of the contract.

d. The North Atlantic Treaty Organization is hereafter referred to as "NATO".

e. The term "days" shall be interpreted as meaning calendar days

2. Applicable law. Except as otherwise provided in this contract, this contract shall be governed, interpreted and construed with the laws of the commonwealth of Virginia of the United States of America.

3. Assignment. This agreement is not assignable by the Contractor either in whole or in part unless agreed in writing by HQ SACT Contracting Officer in accordance with;

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

b. Sub-contractors shall be limited to citizens or legal entities of member nations of NATO, unless specifically authorized by the Contracting Officer.

c. The Contractor shall determine that any sub-contractor proposed by him for the furnishing of supplies or services which shall involve access to classified information in the Contractor's custody has been granted an appropriate facility security clearance by the sub-contractor's national authorities, which is still in effect, prior to being given access to such classified information.

4. Acceptance

a. Acceptance or rejection of the supplies shall be made as promptly as practicable after delivery, except as otherwise provided in this contract.

b. Acceptance shall be conclusive, except for latent defects, fraud, gross mistakes

NATO UNCLASSIFIED

amounting to fraud, or otherwise stated in the Contract. It is the action by which HQ SACT acknowledges that the Contractor has fully demonstrated that the deliveries are complete and operational. The formal acceptance will take place when the following requirements have been met:

- Availability at final destination of all deliverables.
- Successful completion of acceptance testing.
- Verification of the inventory.
- Satisfactory completion of all training or other services, if any, required by that date.
- Agreement between the Contracting Officer and the Contractor on a discrepancy list (if necessary) and corresponding clearance dates.

c. When discrepancies exist and if these do not prevent satisfactory use or operation of the supplies, the Contracting Officer may declare the acceptance provisional. In this case he will withhold from payment an amount commensurate with the importance of the discrepancies but in any case not less than ten (10) percent of the total contract value and this until all discrepancies have been cleared; at that time the acceptance becomes final.

5. Service and Parts Availability. Unless as specified otherwise in the Technical Specifications, the Contractor and his subcontractors will maintain and furnish a source of an adequate supply of services, components, spare parts and sub-assemblies to properly maintain the supplies for a period of minimum five (5) years from Contract Effective Date.

6. Preferred Customer

a. The Contractor warrants that the prices set forth in this contract are as favorable as those extended to any Government, Agency, Company, Organization or individual purchasing like quantities covered by the contract under similar conditions. In the event that prior to complete delivery under this contract the Contractor offers any of such items in substantially similar quantities to any customer at prices lower than those set forth herein, the Contractor shall so notify HQ SACT and the prices of such items shall be correspondingly reduced by a supplement to this contract.

b. Prices in this sense means "Base Price" prior to applying any bonuses.

7. Notice of Shipment

a. At the time of delivery of any supplies to a carrier for transportation, the Contractor shall give notice of shipment to the Contracting Officer and to such other persons or installations as are designated by the Contracting Officer. If such

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instructions have not been received by the Contractor at least one working day prior to such delivery to a carrier, the Contractor shall request instructions from the Contracting Officer concerning notice of shipment to be given.

b. The following information shall be included in such notification:

(1) Contract Number

(2) Shipping address

From: (Name and complete address of consignor)

To: (Name and complete address of consignee)

(3) Listing of supplies by Contract Items(s)

(4) Number of and marking on packages(s)

(5) Weight and dimensions of packages(s)

(6) Name and address of Carrier, mode and date of shipment with waybill number,

(7) Customs documents required by Contractor (if applicable).

8. Security

a. The Contractor shall comply with all security requirements prescribed by HQ SACT and the National Security Authority or designated security agency of each NATO country in which the contract is performed.

b. The Contractor shall be responsible for the safeguarding of NATO classified information, material and equipment entrusted to him or generated by him in connection with the performance of the contract.

c. Any known or suspected breaches of security or other matters of security significance shall be reported by the Contractor to the Contracting Officer and to the National Security Authority or designated security agency.

d. The Contractor shall apply to the Contracting Officer for approval before sub-contracting any part of the work, if the sub-contract would involve the sub-contractor in access to classified information. The Contractor shall place the sub-contractor under security obligations no less stringent than those applied to his own contract

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9. Inspection

a. Unless otherwise specifically provided for in the specifications, all equipment, materials and articles incorporated in the work covered by this contract are to be new and of the most suitable grade of their respective kinds for the purposes intended. All workmanship shall be first class.

b. All supplies (which terms throughout this clause includes without limitation raw materials, components, intermediate assemblies, and end products) shall be subject to inspection and test by HQ SACT, to the extent practicable at all times and places including the period of manufacture, and in any event prior to acceptance.

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

d. If any inspection or test is made by HQ SACT on the premises of the Contractor or sub-contractor, the Contractor without additional charge shall provide all reasonable facilities and assistance to inspectors in the performance of their duties. If HQ SACT inspection or test is made at a point other than the premises of the Contractor or a sub-contractor, it shall be at the expense of HQ SACT except as otherwise provided in this contract. In case of rejection HQ SACT shall not be liable for any reduction in value of samples used in connection with such inspection or test. HQ SACT reserves the right to charge to the Contractor any additional cost of HQ SACT inspection and test when supplies are not ready at the time such inspection, when test is requested by Contractor or when reinspection or retest is necessitated by prior rejection. Failure to inspect supplies shall neither relieve the Contractor from responsibility for such supplies as are not in accordance with the contract requirements nor impose liability on HQ SACT therefore.

e. The inspection and test by HQ SACT of any supplies does not relieve the Contractor from any responsibility regarding defects or other failures to meet the contract requirements which may be discovered prior to acceptance. Except as otherwise provided in the contract, acceptance shall be conclusive except as regards latent defects, hidden deficiencies, fraud, or such gross mistakes as amount to fraud.

10. Title. Unless specified elsewhere in this contract, title to supplies furnished under this contract shall pass to HQ SACT upon acceptance, regardless of when or where HQ SACT takes physical possession.

11. Supply Warranty

a. Notwithstanding inspection and acceptance by HQ SACT of supplies furnished under the contract or any provision of this contract concerning the conclusiveness

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thereof, the Contractor warrants that for a period of twelve (12) months following the date of acceptance:

- (1) All supplies furnished under this contract will be free from defects in material or workmanship and will conform with the specifications and all other requirements of this contract; and
- (2) The preservation, packaging, packing and marking and the preparation for and method of shipment of such supplies will conform with the requirements of this contract.

b. The Contracting Officer shall give written notice to the Contractor of any breach of the warranties in paragraph a. of this clause within thirty (30) days after discovery of any defect.

c. Within a reasonable time after such notice, the Contracting Officer may either:

- (1) By written notice require the prompt correction or replacement of any supplies or part thereof (including preservation, packaging, packing and marking) that do not conform with requirements of this contract within the meaning of Paragraph a. of this clause; or
- (2) Retain such supplies, whereupon the contract price thereof shall be reduced by an amount equitable under the circumstances and the Contractor shall promptly make appropriate payment.

d. When return, correction or replacement is required, the Contracting Officer shall return the supplies and transportation charges and responsibility for such supplies while in transit shall be borne by the Contractor. However, the Contractor's liability for such transportation charges shall not exceed an amount equal to the cost of transportation by the usual commercial method of shipment between the designated destination point under this contract and the Contractor's plant and return.

e. If the Contractor does not agree as to his responsibility to correct or replace the supplies delivered, he shall nevertheless proceed in accordance with the written request issued by the Contracting Officer per paragraph c to correct or replace the defective or nonconforming supplies. In the event it is later determined that such supplies were not defective or nonconforming within the provisions of this clause, the contract price will be equitably adjusted. Failure to agree to such an equitable adjustment of price shall be a dispute concerning a question of fact within the meaning of the clause of this contract entitled "Dispute".

f. Any supplies or parts thereof furnished in replacement pursuant to this clause shall also be subject to all the provisions of this clause to the same extent as supplies initially delivered. Corrected parts will be warranted for a period not less than six (6) months starting at the time the part is received back at the user's location.

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g. In case of a provisional acceptance the warranty period starts at the date of provisional acceptance and ends twelve (12) months after the date of provisional acceptance.

h. Failure to agree upon any determination to be made under this clause shall be a dispute concerning a question of fact within the meaning of the "Disputes" clause of this contract.

i. The word "supplies" as used herein includes related services.

j. The rights and remedies of HQ SACT provided in this clause are in addition to and do not limit any rights afforded to HQ SACT by any other clause of the contract.

12. Invoices

a. The contractor shall submit an original invoice and three (3) copies (or electronic invoice, if authorized) to the address designated in the contract to received invoices. All invoices shall be submitted no later than 30 days upon completion of work or services performed. An invoice must include: 1) Name and address of the Contractor; 2) Invoice date; 3) Purchase Order number and Purchase Order or Contract line item number; 4) Description, quantity, unit of measure, unit price and extended price of the items delivered; 5) Shipping number and date of shipment including the bill of lading number and weight of shipment if shipped on a bill of lading; 6) Terms of any prompt payment discount offered; 7) Name and address of official to whom payment is to be sent: and 8) Name, title, and phone number of person to be notified in event of defective invoice. All invoices shall be certified by the signature of a duly authorized company representative. Invoices for Contractor Travel shall include: 1) Contractor name; 2) Date of Travel; 3) Number of days; 4) Destinations. All invoices shall be submitted to:

HQ SACT
Accounts Payable
7857 Blandy Road
Suite 100, SR-82,
Norfolk, VA 23551-2490

b. Electronic Fund Transfer is the prescribed method of payment for HQ SACT. Contractors are requested to submit copies of banking information available at (<http://www.act.nato.int/budfin/budfinmain.htm>). Such information shall be submitted to HQ SACT 14 days prior to any contract award.

13. Payment. Payment shall be made for items accepted by HQ SACT that have been delivered to the delivery destinations set forth in this contract. Payments under this contract may be made by HQ SACT by electronic funds transfer payments or (check in exceptional cases) and shall submit this designation to the contracting officer as

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directed. In the event the Contractor, during the performance of this contract, elects to designate a different financial institution for receipt of any payment made using electronic funds transfer procedures, notification of such change and the required information must be obtained by HQ SACT thirty (30) days prior to the date such change is to become effective. The documents furnishing the information required in this clause must be dated and contain the signature, title, and telephone number of the Contractor official authorized to provide it, as well as the Contractor's name and Purchase Order number. Contractor failure to properly designate a financial institution or to provide appropriate payee bank account information may delay payments of amounts otherwise properly due. Discount time will be computed from date of delivery at place of acceptance or from receipt of correct invoice at the office specified by HQ SACT, whichever is later. For the purpose of computing the discount earned, payment shall be considered to have been made on the date which appears on the payment check or the specified payment date if an electronic funds transfer payment is made.

14. Taxes. The contract excludes all applicable Federal, State, and local taxes and duties. HQ SACT is a tax-exempt organization.

15. Excusable Delays. The Contractor shall be liable for default unless nonperformance is caused by an occurrence beyond the reasonable control of the Contractor and without its fault or negligence such as, acts of God or the public enemy, acts of HQ SACT in its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, unusually severe weather, and delays of common carriers. The Contractor shall notify the contracting Officer in writing as soon as is reasonably possible after the commencement of any excusable delay, setting forth the full particulars in connection therewith, shall remedy such occurrence with all reasonable dispatch, and shall promptly give written notice to the Contracting Officer of the cessation of such occurrence.

16. Indemnity. The contractor shall indemnify HQ SACT and its officers, employees and agents against liability, including costs for actual or alleged direct or contributory infringement of or inducement to infringe, any United States or foreign patent, trademark, copyright, or other intellectual property right, arising out of the performance of this contract, provided the Contractor is reasonably notified of such claims and proceedings.

17. Disputes. Any dispute regarding the interpretation or application of this Agreement shall be dealt with in the first instance by discussions between TNO and the Principal. Only in the event that a dispute cannot be resolved through discussions, will a dispute be presented to a court of competent jurisdiction in The Hague

18. Termination for Convenience. HQ SACT reserves the right to terminate this contract, or any part hereof, for its sole convenience. In the event of such termination, the Contractor shall immediately stop all work hereunder and shall immediately cause any and all of its suppliers and subcontractors to cease work. Subject to the terms of

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this contract, the Contractor shall be paid a percentage of the contract price reflecting the percentage of the work performed prior to the notice of termination, plus reasonable charges the Contractor can demonstrate to the satisfaction of HQ SACT using its standard record keeping system have resulted from the termination. In the event of the failure of the Contractor and the Contracting Officer to agree as provided in paragraph d. upon the whole amount to be paid to Contractor by reason of the termination of work pursuant to this clause, the Contracting Officer shall pay to the Contractor the amounts determined by the Contracting Officer. The Contractor shall not be required to comply with the cost accounting standards or contract cost principles for this purpose. This paragraph does not give SACT any right to audit the Contractor's records. The Contractor shall not be paid for any work performed or costs incurred which reasonably could have been avoided.

19. Termination for Default

a. HQ SACT may, subject to the provisions of paragraph c. below, by written notice of default to the Contractor, terminate the whole or any part of this contract in any one of the following circumstances:

- (1) If the Contractor fails to make delivery of the supplies or to perform the Services within the time specified herein or any extension thereof; or
- (2) If the Contractor fails to perform any of the other provisions of this contract, or so fails to make progress as to endanger performance of this contract in accordance with its terms and in either of these two circumstances does not cure such failure within a period of ten days (or such longer period as the Contracting Officer may authorize in writing) after receipt of notice from the Contracting Officer specifying such failure.

b. In the event HQ SACT terminates this contract in whole or in part as provided in paragraph a. of this clause, HQ SACT may procure supplies or services similar to those so terminated and the Contractor shall be liable to HQ SACT for any excess costs for such similar supplies or services. The Contractor shall continue the performance of this contract to the extent not terminated under the provisions of this clause.

c. Except with respect to defaults of sub-contractors, the Contractor shall not be liable for any excess costs if the failure to perform the contract arises out of causes beyond the control and without the fault or negligence of the contractor. If the failure to perform is caused by the default of a sub-contractor, and if such default arises out of causes beyond the control of both the Contractor and sub-contractor, without the fault or negligence of either of them, the Contractor shall not be liable for any excess costs for failure to perform unless the supplies or services to be furnished by the sub-contractor were obtainable from other sources in sufficient time to permit the Contractor to meet the required delivery schedule.

d. If this contract is terminated as provided in paragraph a. of this clause, HQ SACT,

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in addition to any other rights provided in the clause, may require the Contractor to transfer title and deliver to HQ SACT in the manner and to the extent directed by the Contracting Officer:

- (1) Any completed supplies and
- (2) Such partially completed supplies and materials, parts, tools, die, jigs, Fixtures, plans, drawings, information and contract rights (hereinafter called "Manufacturing materials") as the Contractor has specifically produced or Specifically acquired for the performance of such part of this contract as has been terminated; and the Contractor shall, upon direction of the Contracting Officer, protect and preserve property in the possession of the Contractor in which HQ SACT has an interest. Payment for completed supplies delivered to and accepted by HQ SACT shall be at the contract price. Payment for manufacturing materials delivered to and accepted by HQ SACT and for the protection and preservation of property shall be in an amount agreed upon by the Contractor and Contracting Officer; failure to agree such amount shall be a dispute concerning a question of fact within the meaning of the clause of this contract entitled "Dispute". HQ SACT may withhold from amounts otherwise due the Contractor for such completed supplies or manufacturing materials such sum as the Contracting Officer determines to be necessary to protect HQ SACT against loss because of outstanding liens or claims of former lien holders.

e. If, after notice of termination of this contract under the provisions of this clause, it is determined for any reason that the Contractor was not in default under the provisions of this clause, or that the default was excusable under the provisions of this clause, the rights and obligations of the parties shall, if the contract contains a clause providing for termination for convenience of HQ SACT, be the same as if the notice of termination had been issued pursuant to such clause. If, after such notice of termination of this contract under the provisions of this clause, it is determined for any reason that the Contractor was not in default under the provisions of this clause, and if this contract does not contain a clause providing for termination for convenience of HQ SACT the contract shall be equitably adjusted to compensate for such termination and the contract modified accordingly; failure to agree to any such adjustment shall be a dispute concerning a question of fact within the meaning of the clause of this contract entitled "Disputes".

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

20. Limitation of Liability. Except as otherwise provided by an express or implied warranty, the Contractor will not be liable to HQ SACT for consequential damages resulting from any defects or deficiencies in accepted items

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21. Export Control. Contractor warrants that, if applicable all necessary technical assistance agreements (TAA), export control or other associated arrangements shall be valid prior to contract award. Should a Contractor require export pre-approval HQ SACT legal staff will be provided a preview of said companies request PRIOR to the companies submission to a Government entity. Upon validation of request by HQ SACT Legal staff, subject agreement or request may be submitted to appropriate authority. (Please note: There are no specified time delays regarding TAA, aor export control request being processed. However, experience has shown request can take anywhere from 30 days to 90 days depending on complexity of request, and administrative preparedness).

22. Risk of Loss. Unless the contract specifically provides otherwise, risk of loss or damage to the supplies provided under this contract shall remain with the Contractor until, and shall pass to HQ SACT upon: 1) Delivery of the supplies to a carrier, if transportation is f.o.b. origin; or 2) Delivery of the supplies to HQ SACT at the destination specified in the contract, if transportation is f.o.b. destination.

23. Authorization to Perform. The Contractor warrants that he and his sub-contractors have been duly authorized to operate and do business in the country or countries in which this contract is to be performed; that he and his sub-contractors have obtained all necessary licenses and permits required in connection with the contract; that he and the sub-contractors will fully comply with all the laws, decrees, labor standards and regulations of such country or countries during the performance of this contract; and that no claim for additional moneys with respect to any authorizations to perform will be made upon HQ SACT.

24. Performance. Candidates/contractors who accept HQ SACT issued contracts, shall, at a minimum, serve in a designated capacity for no less than 180 calendar days from commencement of contract period of performance. Contracts' with performance periods having less than 180 days in totality shall require contractors to serve a minimum of 50% of estimated performance period. Should a candidate vacate the contract in less time than described, HQ SACT reserves the right to cancel the contract in whole or part. Replacement candidates, if acceptable to HQ SACT, shall be reviewed by HQ SACT for compliance, and, or technical acceptance per the original Statement of Work and final acceptance by HQ SACT Contracting Officer.

25. Travel. In accordance with AFM Section 24, Contractor Travel, travel by contractors in support of the HQ SACT mission will only be performed when a member of the approved International HQ SACT Peacetime Establishment is unable to perform the mission.

Once contractor travel has been established under a contract and a contractor is tasked to travel, the HQ SACT Contractor Travel Request form must be filled out and approved prior to any travel being conducted. This form may be found at: <http://www.act.nato.int/budfin/contractortravel.htm>

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The in-house Travel Agency will set the Transport Ceiling Cost and at that time the contractor may elect to book their transportation with the in-house travel agency. (Please refer to Clause Number 7 above).

Transport tickets purchased through the in-house travel agency will be reimbursed by the HQ SACT entity directly to the in-house travel agency, and the applicable travel line of the contract will be charged. These costs will not be invoiced by, or paid to, the contractor company. When transport tickets are purchased through another source only the ceiling cost allocated by the in-house travel agency will be reimbursed to the contractor company.

Per Diem is based on the NATO Group One subsistence allowance, which covers meals, lodging, incidental expenses and any applicable overhead and/or fees. Per Diem Reimbursement will only be made at these rate amounts. NATO Group III daily subsistence allowances are posted on HQ SACT website at <http://www.act.nato.int/budfin/contractortravel.htm>.

26. Proposed Candidates. No proposals shall be accepted or considered for candidates already assigned to an existing contract with HQ SACT, without the prior permission of the Contracting Officer. .

27. Partial awards will be allowed when determined in the best interests of NATO. The Contracting Awards Board and the Contracting Officer, when deemed prudent and necessary have the authority to make this determination. Partial bidding shall be consistent with released solicitation.

28. Competition. HQ SACT reserves the right to engage in Full and Open Competition after exclusion of sources.

29. Contractor Notice Regarding Delay. In the event the Contractor encounters difficulty in meeting performance requirements, or when he anticipates difficulty in complying with the contract delivery schedule or date, he shall immediately notify the Contracting Officer in writing, giving pertinent details; provided, however, that this data shall be informational only in character and that this provision shall not be construed as a waiver by HQ SACT of any delivery schedule or date, or of any rights or remedies provided by law or under this contract.

30. Notice and Assistance regarding Patent and Copyright Infringement

a. The Contractor shall report to the Contracting Officer, promptly and in reasonable written detail, each notice or claim of patent or copyright infringement based on the performance of this contract of which the Contractor has knowledge.

b. In the event of any claim or suit against HQ SACT on account of any alleged patent or copyright infringement arising out of the performance of this contract or out of the use of any supplies furnished or work or services performed hereunder, the

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Contractor shall furnish to HQ SACT, when requested by the Contracting Officer, all evidence and information in possession of the Contractor pertaining to such suit or claim. Such evidence and information shall be furnished at the expense of HQ SACT except where the Contractor has agreed to indemnify HQ SACT.

c. This clause shall be included in all sub-contracts.

31. Health, Safety and Accident Prevention. If the Contracting Officer notifies the Contractor in writing of any non-compliance in the performance of this contract, with safety and health rules and requirements prescribed on the date of this contract by applicable national or local laws, ordinances and codes, and the Contractor fails to take immediate corrective action, the Contracting Officer may order the Contractor to stop all or part of the work until satisfactory corrective action has been taken. Such an order to stop work shall not entitle the Contractor to an adjustment of his contract price or other reimbursement for resulting increased costs, or to an adjustment of the delivery or performance schedule.

32. Patent Indemnity. If the amount of this contract is in excess of \$1,000,000 , the Contractor shall indemnify HQ SACT and its officers, agents and employees against liability, including costs, for infringement of any letters patent (except letters patent issued upon an application which is now or may hereafter be kept secret or otherwise withheld from issue by order of the government which issued the letters patent) arising out of the manufacture or delivery of supplies under this contract, or out of the use or disposal by or for the account of HQ SACT of such supplies. The foregoing indemnity shall not apply unless the Contractor shall have been informed as soon as practicable by HQ SACT of the suit or action alleging such infringement and shall have been given such opportunity as is afforded by applicable laws, rules, or regulations to participate in the defense thereof; and further, such indemnity shall not apply to:

a. An infringement resulting from compliance with specific written instructions of the Contracting Officer directing a change in the supplies to be delivered or in the materials or equipment to be used or directing a manner of performance of the Contract not normally used by the Contractor;

b. An infringement resulting from an addition to, or change in, such supplies or components furnished which addition or change was made subsequent to delivery or performance by the Contractor; or

c. A claimed infringement which is settled without the consent of the Contractor, unless required by a court of competent jurisdiction.

33. Rights in Technical Data and Computer Software

a. HQ SACT shall have unlimited rights in:

(1) All technical data and computer software, to include source code, resulting

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from performance of experimental, developmental, integration, testing, or research work which was specified as an element of performance in this contract.

- (2) Plans, drawings, manuals or instructional materials prepared or required to be delivered under this contract for implementation management, installation, operation, maintenance and training purposes.

b. Technical data and software delivered under this contract shall be marked with the number of this contract, name of Contractor and the rights transferred to HQ SACT.

34. Software Releases and Updates.

a. All software implemented on or delivered with the supplies shall be at the start of acceptance, the most recent versions or releases as available.

b. The Contractor shall for a duration of minimum five (5) years after acceptance, and upon their availability, offer to HQ SACT all software changes, fixes and new releases. These shall be offered at no cost when they are offered free of charge on the commercial market.

35. Inconsistency between English Version and Translation of Contract. In the event of inconsistency between any terms of this contract and any translation thereof into another language, the English language meaning shall control

36. Contract Effective Date (CED). The effective date of the contract is the date of last signature by the contracting parties, or a specific date set forth in the Contract.

37. Enforcement. Failure by either party to enforce any provision of this contract will not be deemed a waiver of future enforcement of that or any other provision. The invalidity or unenforceability of any provision of this contract shall not affect the other provisions hereof, and this contract shall be construed in all respects if such invalid or unenforceable provisions were omitted

38. Order of Precedence. Any inconsistencies in the solicitation or contract shall be resolved by giving precedence in the following order: (1) Special Terms and Conditions; (2) General Terms and Conditions and Purchase Order terms; (3) solicitation provisions if this is a solicitation; (4) the specification/statement of work; (5) other HQ SACT documents, exhibits and attachments; (6) addenda to this solicitation or contract, including any license agreements for computer software, or other Contract agreements.

39. Entire Agreement. This contract sets for the entire agreement between the parties with respect to the subject matter hereof, and supersedes all prior agreements or representations, oral or written, regarding such subject matter. HQ SACT shall not be

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bound by, and specifically objects to any term, condition, or other provision inconsistent with or in addition to any provision of this contract that is submitted by Contractor in any correspondence or any document unless HQ SACT specifically agrees to such provision in a written instrument signed by an authorized representative of HQ SACT.

HQ SACT Special Terms and Conditions for Personnel Services Contracts

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HQ SACT Special Terms and Conditions for Commercial Personnel Services Contracts

1. Scope. These special terms and conditions address all issues pertaining to the Commercial Personnel Services to be rendered by the Contractor to HQ SACT under this Contract, thereby taking precedence over the HQ SACT General Terms and Conditions.
2. Type of Contract. As far as the Commercial Personnel Services under this Contract are concerned this is a Level of Effort Contract with a not to exceed limit presented by the man years or fraction thereof, as provided in the SOW. This Contract establishes a contractual relationship strictly between the Contractor and HQ SACT. All employer responsibilities for the Contractor Personnel performing under this Contract shall lie with the Contractor.
3. Definitions.
 - a. Billable Hours. As further specified in these Special Terms and Conditions, hours spent by Contractor Personnel in the immediate performance of this Contract for which the Contractor may bill HQ SACT at the hourly rate set out in this contract.
 - b. Commercial Personnel Services. As specified in the SOW, the continuous performance to be provided by Contractor Personnel. The amount of Commercial Personnel Services is calculated on the basis of Man Years or a fraction thereof.
 - c. Contractor Personnel. An individual employed by the Contractor to perform the services required under this Contract for HQ SACT.
 - d. HQ SACT Work Days. Mondays through Fridays with the exception of HQ SACT Holidays. The number of HQ SACT Holidays may vary from year to year. A list may be obtained through the Contracting Officer.
 - e. HQ SACT Working Hours. On HQ SACT Work Days, 7.5 hours daily between 0800 and 1700 hours.
 - f. Man Year. 1800 hours of service to be rendered by one Contractor Personnel within one calendar year. The basis of this calculation is 46 weeks of contract performance at 37.5 hours assuming 5 HQ SACT work days per week. As a baseline the further assumption is: 15 days of HQ SACT holidays and 15 days as the minimum individual leave, thus allowing for the allocation of a minimum of 75 hours per year as possible overtime. As, in particular, the number of individual leave days may be greater and the number of HQ SACT holidays may vary, the allowable overtime figure will change accordingly. In no event shall the ceiling of 1800 hours per man year or corresponding fraction thereof be exceeded.
 - g. Overtime. Hours within the contracted man year or fraction thereof (1800 hours maximum for full year's service) served by Contractor Personnel outside of the limitations of the Delivery of Service stated in paragraph 4 and the SOW, as for each occasion requested by the COTR in writing.
 - h. Products. Any item, document, writing, study, briefing, data base, piece of software or any other physical or intellectual result of the performance of the

HQ SACT Special Terms and Conditions for Personnel Services Contracts

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commercial personnel service or the associated interaction with NATO staff which may be subject to ownership rights.

4. Delivery of Service. All Commercial Personnel Services under this Contract will be performed only on HQ SACT Work Days and during HQ SACT Working Hours to total no more than 7.5 hours per HQ SACT Work Day.
5. Exceptions from Delivery of Service. Under exceptional circumstances Commercial Personnel Services may be provided outside of the limitations for the Delivery of Services stated in paragraph 4.
 - a. Overtime requires a specific written request to the Contractor by the COTR.
 - b. Permanent deviation has to be in writing in the SOW with the signature of the Contracting Officer.
6. Coordination of Delivery of Service and Personal Leave. In order to ensure a balanced professional performance of the Contractor Personnel employed by the Contractor, during their performance for HQ SACT, the Contractor shall ensure that each Contractor Personnel will take a minimum of 15 and not more than 30 HQ SACT Work Days as personal leave during the course of a calendar year.
7. Coordination of Absences. To ensure the uninterrupted flow of HQ SACT projects, any absence by Contractor Personnel requires earliest possible coordination with the COTR. Generally, such absence requires the approval by the COTR.
 - a. Personal Leave. At the beginning of the Contract the Contractor and the COTR will establish a leave plan for each Contractor Personnel.
 - b. Sickness. Should absences caused by sickness affect the performance of an HQ SACT project, the Contractor, upon request by the Contracting Officer, shall immediately replace the incapacitated Contractor Personnel with an equally qualified individual.
 - c. Other Absences. Unless otherwise arranged for, the Contractor shall ensure the full presence of the Contractor Personnel in accordance with the Delivery of the Service set out in paragraph 4.
8. Billable Hours. Only time spent by Contractor Personnel in the immediate performance of this Contract.
 - a. Billable hours on travel. Billable hours for travel performed as a service under this Contract will be any time spent away from the primary location of duty, between 0800 and 1700 hours local time up to a maximum total of 7.5 hours for any given work day at the destination of the travel.
 - b. Overtime. All overtime within the limit of the contracted manyear or fraction thereof (total of 1800 hours for full year's service) shall be billed at the normal hourly rate set out in this contract.
 - c. Non-performance. Personal leave, closing of the Headquarters by the order of the HQ SACT Chief of Staff, sickness, company coordination, company reports,

HQ SACT Special Terms and Conditions for Personnel Services Contracts 10/08

training, lunch, breaks or any other activity not immediately related to the performance of the services required under this Contract do not constitute billable hours.

9. Commitment of Contractor Personnel. The Contractor warrants that the Contractor Personnel initially presented for the performance of this Contract will perform this Contract for its duration. Any exchanges of Contractor Personnel shall meet the requirements of the SOW and be performed only with written consent by the Contracting Officer.
10. Deficient performance. Should committed Contractor Personnel perform unsatisfactorily the Contractor will exchange such Contractor Personnel, at the request of HQ SACT Contracting Officer for Contractor Personnel meeting the quality requirements set out in the SOW.
11. Contractor Responsibility for Contractor Personnel. The Contractor, and in the case being, the sole proprietor, as the employer of the Contractor Personnel performing the services under this Contract shall be fully responsible for all insurances, emoluments as well as taxes and payments to the health, social security and workmen's compensation schemes due.
12. Billing. The Contractor shall bill time for Contractor Personnel at the hourly rate set out in this contract ONLY for billable hours.
13. Billing for Travel. Travel by Contractor Personnel shall be authorised and reimbursed in accordance with ACT Financial Manual Section 24, "Contractor Travel".
 - a. The in-house Travel Agency will set the transport ceiling cost.
 - b. Transport tickets purchased through the in-house travel agency will be reimbursed by HQ SACT directly to the in-house travel agency. These costs will not be invoiced by, or paid to, the contractor company. When transport tickets are purchased by the Contractor through another source only the ceiling cost allocated by the in-house travel agency will be reimbursed to the Contractor.
 - c. All incidental expenses to include overhead for the performance of travel will be reimbursed through a flat NATO Civilian subsistence allowance as posted on <http://www.act.nato.int/budfin/contractortravel.htm>.
14. Invoices. All invoices shall be provided by the Contractor in accordance with the General Terms and Conditions to this Contract. Additionally, the invoices for Commercial Personnel Services shall contain, at a minimum,
 - a. A breakdown of the Contractor Personnel;
 - b. The billable hours performed by each of them by day; and also
 - c. Indicating travel, absences our other relevant information; as well as
 - d. Any overtime shall be provided together with the requisite COTR request.

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10/08

15. Instructions for safety and management of the HQ. The Contractor shall ensure that the Contractor Personnel honour all HQ SACT Directives and further guidance by the Chief of Staff regarding the safety and management of HQ SACT.
16. Work Space. If provided for in the SOW, HQ SACT will provide working spaces for the Contractor Personnel. Should these spaces not be considered adequate by the Contractor, the Contractor will at its own expense ensure working spaces in the immediate vicinity of the identified location of performance.
17. Representation of HQ SACT/NATO. When dealing with third parties during the execution of this Contract, the Contractor Personnel shall present themselves as representatives of the Contractor working under contract for HQ SACT/NATO. Contractor Personnel shall not take decisions or commitments for HQ SACT/NATO.
18. Ownership of Work Products. All Products created by Contractor Personnel under this contract are to be original and are the property and under the copyright of HQ SACT, unless otherwise specifically stated in this Contract.
19. Disclosure of Information.

'Information' means all information or material, whether in oral, written, visual, electronic and/or other form disclosed to one party by or on behalf of the other party under or in connection with the Contract.

19.1. Subject to this clause each party shall;

- (a) Treat in confidence all information it receives from the other party;
- (b) Agree not to disclose any of that Information to any third party without the prior written consent of the other party, which consent shall not unreasonably be withheld, except that the Contractor may disclose Information in confidence, without prior consent, to such persons and to such extent as may be necessary for the performance of the Contract.
- (c) shall, upon request from the other party, return any Information or erase any electronic files in its possession.
- (d) shall not use any of that Information otherwise than for the purpose of the Contract
- (e) shall not copy any of that Information except to the extent necessary for the

19.2 The Contractor shall take all reasonable precautions necessary to ensure that all Information disclosed to the Contractor by or on behalf of HQ SACT under or in connection with the Contract:

- (a) Is disclosed to its employees and sub-contractors, only to the extent necessary for the performance of the Contract.

- (b) Is treated in confidence by them and not disclosed except with prior written consent or used otherwise than for the purpose of performing work or having work performed for HQ SACT under the Contract or any sub-contract under it.
- 19.3 The Contractor shall ensure that his employees are aware of his arrangements for discharging the obligations of this Clause before they receive Information and take such steps as may be reasonably practical to enforce such arrangements.
- 19.4 Neither party shall be in breach of this Clause where it can show that any disclosure of Information was made solely and to the extent necessary to comply with a statutory or judicial obligation. Where such a disclosure is made, the party making the disclosure shall ensure that the recipient of the Information is made aware of and asked to respect its confidentiality. Such disclosure shall in no way diminish the obligations of the parties under the terms of this Clause.

HQ SACT IFIB 10-02 CONTRACTOR SUPPORT TO OPERATIONAL EXPERIMENTATION

Annex A

Evaluation Criteria and Checklist

Response Part 1 - Company Experience

Scoring Methodology. If a response is evaluated as being non-compliant, the entire response will not be considered for further evaluation.

Table 1-1 - Evaluation Criteria and Checklist

Ser	Evaluation Factor	Value Range	Score
1	Demonstrates company experience in military or industrial transformation in at least three of the last five years.	Compliant/Non-compliant	Compliant Non-compliant
2	Submitted a paper not to exceed 15 pages outlining company expertise	Compliant/Non-compliant	Compliant Non-compliant
3	Submitted a quality assurance plan not exceeding 5 pages	Compliant/Non-compliant	Compliant Non-compliant
4	Submitted list of companies or organisations to whom similar work was provided during at least three of the last five years	Compliant/Non-compliant	Compliant Non-compliant

HQ SACT IFIB 10-02 CONTRACTOR SUPPORT TO OPERATIONAL EXPERIMENTATION

5	Answers reachback questions posed in SOW	Compliant/Non-compliant	Compliant Non-compliant
6	Vendor describes how they are positioned to (1) readily integrate contractors in a multinational team among ACT's military and NATO International Civilian components; (2) leverage a broad network of industrial partners to complement NATO's military network, thereby helping to ensure that ACT has ready access to a powerful suite of information, knowledge and understanding relevant to Alliance transformation.	Compliant/Non-compliant	Compliant Non-compliant
	Total		Compliant Non-compliant

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Response Part 2 – Onsite Support

Scoring Methodology. Table 2-1 asks for certification that the contractor can provide all of the required personnel with the required skillsets within the timelines given. If the certification is given it will be given as well for all of the non-resume positions in Table 2-2. Contractors that do not submit these certifications will be found non-compliant. If a response is evaluated as non-compliant, the entire response will not be considered for further evaluation.

Table 2-1 - Evaluation Criteria and Checklist

Ser	Evaluation Factor	Value Range	Score
1	Certifies that vendor can supply all of the required personnel within the timelines given	Compliant/Non-compliant	Compliant Non-compliant
2	Certifies that all personnel will meet the skillset requirements	Compliant/Non-compliant	Compliant Non-compliant
3	Contractor submitted a detailed schedule showing key contractor dates from contract award until 31 December 2010. (not exceeding 5 pages)	Compliant/Non-compliant	Compliant Non-compliant

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Table 2-2 - Evaluation Criteria and Checklist

Se r	Title	Resume Require d	Skillset Appx	Reachback Contact Name	Value Range	Score
1	Experimentation Programme Support Manager I	Yes	Appx 1		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non-compliant
2	Experimentation Project Manager I	Yes	Appx 2		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non-compliant
3	Experimentation Project Manager II	No	Appx 3		Compliant/Non-compliant	Compliant Non-compliant
4	Experiment Integrator I	Yes	Appx 4		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non-compliant
5	Experiment Integrator I	Yes	Appx 4		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non compliant

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6	Experiment Integrator I	Yes	Appx 4		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non-compliant
7	Experiment Integrator I	Yes	Appx 4		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non-compliant
8	Experimenter I	Yes	Appx 5		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non-compliant
9	Experimenter I	Yes	Appx 5		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non-compliant
10	Experimenter I	Yes	Appx 5		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non-compliant
11	Experimenter II	No	Appx 6		Compliant/Non-compliant	Compliant Non-compliant
12	Experimenter II	No	Appx 6		Compliant/Non-compliant	Compliant Non-compliant

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13	Experimenter II	No	Appx 6		Compliant/Non-compliant	Compliant Non-compliant
14	Analyst I	Yes	Appx 7		No resume submitted (Non-compliant) Candidate meets 100% of requirements (Compliant)	Compliant Non-compliant
15	Analyst II	No	Appx 8		Compliant/Non-compliant	Compliant Non-compliant
16	Analyst II	No	Appx 8		Compliant/Non-compliant	Compliant Non-compliant
17	Experimentation Knowledge Manager II	No	Appx 9		Compliant/Non-compliant	Compliant Non-compliant
	Total					Compliant Non-compliant

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Response to Section 3 –Surge Capability

Scoring Methodology. Within the part 3 evaluation checklist, the contractor states that they can provide the required personnel with required skillsets within the time required. Contractors that do not submit these certifications will be found non-compliant.

Table 3-1 - Evaluation Criteria and Checklist

Ser	Evaluation Factor	Value Range	Score
1	Certifies that vendor can supply all of the required personnel within the timelines given	Compliant/Non-compliant	Compliant Non-compliant
2	Certifies that all personnel will meet the skillset requirements	Compliant/Non-compliant	Compliant Non-compliant
3	Certifies that all personnel will meet the generic qualifications	Compliant/Non-compliant	Compliant Non-compliant

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Table 3-1 - Evaluation Criteria and Checklist

Ser	Title	Resume	Skillset Annex H Appx	Reachback Contact Name	Value Range	Score
1	Knowledge Manager I	No	Appx 15		Compliant/Non-compliant	Compliant Non-compliant
2	Knowledge Manager II	No	Appx 16		Compliant/Non-compliant	Compliant Non-compliant
3	Knowledge Manager III	No	Appx 17		Compliant/Non-compliant	Compliant Non-compliant
4	Tech Knowledge Manager III	No	Appx 18		Compliant/Non-compliant	Compliant Non-compliant
5	Knowledge Manager IV	No	Appx 19		Compliant/Non-compliant	Compliant Non-compliant

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6	Knowledge Manager V	No	Appx 20		Compliant/Non-compliant	Compliant Non-compliant
7	Associate Knowledge Manager V	No	Appx 21		Compliant/Non-compliant	Compliant Non-compliant
8	Information Technology Associate	No	Appx 10		Compliant/Non-compliant	Compliant Non-compliant
9	Advanced Technology Engineer	No	Appx 11		Compliant/Non-compliant	Compliant Non-compliant
10	Senior Computer/Software Engineer	No	Appx 12		Compliant/Non-compliant	Compliant Non-compliant
11	Technology Engineer/Analyst	No	Appx 13		Compliant/Non-compliant	Compliant Non-compliant

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12	Junior Technology Engineer/Analyst	No	Appx 14		Compliant/Non-compliant	Compliant Non-compliant
13	Experimenter I	No	Appx 5		Compliant/Non-compliant	Compliant Non-compliant
14	Experiment Analyst I	No	Appx 7		Compliant/Non-compliant	Compliant Non-compliant
15	Experimenter II	No	Appx 6		Compliant/Non-compliant	Compliant Non-compliant
16	Experimenter II	No	Appx 6		Compliant/Non-compliant	Compliant Non-compliant
17	Experiment Analyst II	No	Appx 8		Compliant/Non-compliant	Compliant Non-compliant

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18	Experiment Analyst II	No	Appx 8		Compliant/Non-compliant	Compliant Non-compliant
	Total					Compliant Non-compliant

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Response to Section 4 – Demonstration of Knowledge and Expertise

Scoring Methodology. Within the part 4 evaluation checklist, an evaluation will be given for how well the responses accomplished the given tasks.

Table 4-1 – Task 1 Evaluation Criteria and Checklist

Ser	Evaluation Factor	Value Range	Score
1	Submitted a point paper of four pages or less to accomplish the task.	Compliant/Non compliant	Compliant Non-compliant
2	Identified and explained at least six valid facts in this task which should concern the experimenter	Compliant/Non compliant	Compliant Non-compliant

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Table 4-2 – Task 2 Evaluation Criteria and Checklist

Ser	Evaluation Factor	Value Range	Score
1	Submitted a paper of four pages or less to accomplish the task.	Compliant/Non compliant	Compliant Non-compliant
2	List and explain at least six PRINCE 2 project management considerations that you would address in analysing the impact of the latest news.	Compliant/Non compliant	Compliant Non-compliant
3	Explain at least two benefits of experimentation during the refinement and validation of the prototype.	Compliant/Non compliant	Compliant Non-compliant

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

EXPERIMENT DESIGN DOCUMENT

Covers execution & admin of experiment

“EXPERIMENT NAME”

“EXERCISE / OPERATION NAME”

POC: Experiment Lead Name/Grade/Org

IVSN

Fax +

UNCLAS E-mail:

1. CONCEPTUAL MODEL

The Conceptual Model describes the approach of the corresponding concept under development and gives guidance for the experiment. It is developed with the strong involvement of the concept lead. It describes the uses of the experiment; namely whether it is a *discovery*, *hypothesis testing*, or *demonstration/validation* experiment.

2. AIMS AND OBJECTIVES

An experiment aim can be related either to the solution or to providing data to support a recommendation to justify the adoption/continued development of the concept (or even the abandonment of a concept). An objective needs to be stated in clear and simple terms in such a way that:

- An experiment can be designed to meet the objective
- When the experiment is complete it is possible to analyse the results of the experiment to show that the objective has been satisfied.

The Concept Lead, defines the Experiment Aim and Objective(s). In the hierarchical scheme, aims devolve to objectives, which are addressed by a hypothesis in an experiment.

- a. **Aims** are defined in a brief and concise statement on the primary question to be answered.
- b. **Objectives** are defined as specific questions to be addressed that relate to a hypothesis, and how the results of the experiments will be used.

3. COMPONENTS OF THE EXPERIMENT

This paragraph is closely related to the hypotheses. It explains the general methodology and mechanical implementation of the hypotheses, as well as the relation of the experiment to other factors of the venue.

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ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

- a. Treatment: Describe the actual treatments of the experiment. The treatment is the independent variable.
- b. Experimental unit: Describe the quantitative or qualitative unit(s) of the experiment.
- c. Intervention used to manipulate the treatment. Describe the method or techniques that manipulate, adjust, or change the inputs to the treatment.
- d. Experimental Questions. Specific questions the experiment address in relation to each objective listed.
- e. Possible effects: Describe the possible effects that can occur. The possible effects are the dependent variable.

4. EXPERIMENT ENVIRONMENT

This section explains the experiment scenario and discusses how features of the scenario impact planning and implementation. Different types of experiments have varying requirements. These requirements must be balanced against other competing needs that the experiment might face in an actual exercise or operation. This is addressed more specifically in the Criticalities that could have an adverse impact on the experiment:

- a. General military conditions
- b. Level(s) of Command at which the experiment is focused.
- c. Time frame
- d. Type of players involved in the experiment
- e. Outline of scenario
 - (1) Inputs to scenario
 - (2) Sequence of events
 - (3) MEL/MIL interaction with the experiment

5. EXPERIMENT ARCHITECTURE

- a. Type of Experiment: State the type of experiment to be conducted (Empirical, Workshop, Analytic War-game, Constructive, Human in the loop virtual, Field). This statement will provide an overview on why and how the type of experiment selected best supports the hypotheses being addressed. Further details on analytic products, data requirements, data collection, and analysis can be referred to the data collection plan and the data analysis plan.
- b. Architecture/Equipment: Description of the architecture, systems (hardware/software) and/or equipment to be used in the experiment and links with other systems. Also describe the links to the variables in the hypotheses.

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ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

- c. Required Capabilities to Support the Experiment:
- d. CIS and Interoperability:

6. HYPOTHESES

For the experiment state the hypotheses addressed. Describe each hypothesis with the corresponding elements (see Annex B Terms and definitions):

*“If (insert applicable ,if” statement), **then** (insert applicable ,then statement”*

If applicable, the null hypothesis can also be stated. The resultant null hypothesis is:

*“If (insert applicable ,if” statement from the hypothesis), **then no** (insert applicable ,then” statement.”*

- a. Dependent Variable(s):
- b. Independent Variables:
- c. Control Factors:
- d. Relationship of the Variables: Can include the following

Measurement

Factors and variables to consider

Dimensions of performance

Timescale of the observations

Observational transparency

Observation approaches

- e. Relevant Experiment Results: Can include

Explain each hypothesis with respect to the treatment (independent variable), the experimental unit, the intervention used to manipulate the treatment, and the possible effects (dependent variable). This section also gives an overview of the methodology used for each experiment for data collection. Details on implementation and execution can be found in the data collection plan.

7. CRITICALITIES

Criticalities describe the significant problems and risks that the experiment has. Risks can be identified in the Experiment Design Assessment, see Appendix 1. Other risks and problems that can hinder or impact the experiment may also be identified with a subjective analysis of the experiment design, data collection plan, and data analysis plan. It must be understood, however, that no matter how well designed an experiment is it will have some weaknesses and trade-offs that cannot be avoided. The key is to minimize these problems with creative solutions and experiment design.

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

a. Experiment Design Assessment:

The Experiment Design Assessment examines each experiment for how valid the experiment design is. This assessment will identify many risks of the experiment. Negative answers to any of the assessment questions, though subjective, indicate the possibility of a faulty experiment design or the need for serious risk mitigation. Appendix 1 to this annex provides a template work sheet to assist in the assessment.

There are four principle areas of the experiment design assessment:

- (1) Ability to use new capability.
- (2) Ability to detect change.
- (3) Ability to isolate reason for change.
- (4) Ability to relate results to operations.

b. Risks: Address specific risks identified and how the mitigation techniques are applicable.

c. Techniques: Address specific techniques that can have an impact on the experiment.

d. Assumptions: Address assumptions that were used in the planning of the experiment and how they can have an impact on the experiment.

e. Compromises: Address compromises identified that reduce how valid or sound the experiment design is.

f. Constraining Factors: Address other factors that have been identified that may limit or significantly inhibit the experiment or that significantly reduce operational realism. Describe how these factors could affect the results or conclusions of the experiment.

8. PERSONNEL

- Experiment Team personnel and their specific tasks.
- Players necessary to involve.

9. TRAINING RELATED WITH THE EXPERIMENTAL CAPABILITY

- Training of selected members of the HQ's units (or training audience) in use of new tools or capabilities.
- Training of experimenters and observers in the use of new tools and capabilities.

**IFIB 10-02 Contractor Support to Allied Command Transformation Operational
Experimentation**

ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

ANNEX A TO EXPERIMENT DESIGN

“EXPERIMENT NAME”

RISK EVALUATION MATRIX

THREAT	RELEVANCY (High, Medium, Low)	STATUS (Red, Yellow, Green)	RISK MITIGATION
Ability to use capability			
1. Capability not workable: Does the system work?			
2. Player non-use: Do the players have the training and TTP to use the capability?			
3. No effect in output: Does the capability affect the output?			
4. Capability not exercised: Does the scenario call for capability use?			
Ability to detect results			
5. Capability variability: Is system and use in like trials the same?			
6. Player variability: Do the players in like trials have the same characteristics?			
7. Data collection variability: Is there a large error variability in the data collection process?			
8. Trial conditions variability: Are there uncontrolled changes in like trials?			
9. Violation of statistical assumptions: Are correct analysis techniques used and error rates avoided?			
10. Low statistical power: Is the analysis sample sufficient or significant?			
Ability to isolate reasons for results – single group			
11. Capability changes over time: Are there system or process changes during the trials or experiment?			
12. Player changes over time: Will the players change over time?			

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ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

THREAT	RELEVANCY (High, Medium, Low)	STATUS (Red, Yellow, Green)	RISK MITIGATION
13. Data collection changes over time: Are there changes in instrumentation or manual data collection during the experiment?			
14. Trial conditions changes over time: Are there changes in trial conditions during the experiment?			
Ability to isolate reasons for results – multiple groups			
15. Player differences: Are there differences between groups unrelated to the treatment?			
16. Data collection differences: Are there potential data collection differences between treatment groups?			
17. Trial condition differences: Are the trial conditions similar for each treatment group?			
Ability to relate results to operations			
18. Non-representative capability: Is the experimental surrogate functionally representative?			
19. Non-representative players: Are the players similar to the intended operation users?			
20. Non-representative measures: Do the performance measures reflect the desired operational outcome?			
21. Non-representative scenario: Is the representative scenario realistic to the indented operational area(s)?			

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

ENCLOSURE (4) to ANNEX A

DATA ANALYSIS PLAN

“EXPERIMENT Name”

POC: Experiment Analyst, Rank, Org, IVSN / Experiment Lead, Rank, Org, IVSN

NATO WAN email:

UNCLAS E-mail:

1. INTRODUCTION

Describes the overall plan for analysis of the experiment. Outline the main concept to be analyzed, the details of the experiment, methods and tools to be used, and the document deliverables required.

2. CONCEPT ANALYSIS

- a. Relationship to Transformational Concepts: The concept needs to be analyzed to confirm that it is commensurate with the high-level strategic, transformational concepts outlined in ACT policy documents, robustness, and feasible.
- b. Concept Analysis: High-level concept analysis is done prior to experimentation design.
- c. Relationship to DOTMLPFI: Examining the concept’s relationship to DOTMLPFI will reveal specific weaknesses for further analysis and insertion into modelling and experimentation.
- d. Refined Hypothesis(es): From the concept analysis, a refined hypothesis can be developed for experimentation.

3. DATA REQUIREMENTS FOR EXPERIMENT HYPOTHESES

For each hypothesis determine the data requirements for each variable. Data requirements may be contained in one area of the experiment or spread out over a larger venue or time frame. Data requirements (for each variable):

- a. What attribute will be evaluated? Document the rationale for the choice of attribute including which (more) promising alternatives were not chosen and why.
- b. What measure will be used for each attribute and the format required? Document the rationale of the choice of the measure.
- c. Ensure each measure has operational relevance.
- d. Amount of data (for each variable) needed (depending on required level of confidence). Achieving statistical significance is desirable but in many cases is not possible.
- e. Once the required data for collection has been identified, the Experiment Design and the Data Collection Plan can be finalized.

4. ANALYSIS TIME SCHEDULE

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

Shall list single phases of the analysis and the necessary time. Consider enough time for documentation and especially for discussion with often remote counterparts to assure best possible results. As the necessary analysis steps will differ significantly, no mandatory topics will be given. Included are the required training needs for the analysis personnel.

5. ANALYSIS METHODOLOGY

- a. Preliminary Analysis: Format or convert data into a useable form if needed. Check if it is possible for data to directly support a hypothesis.
- b. Variable Analysis: Determine relationships between variables in the experiment by tying independent variables to dependent variables. Discuss the variations of dependent variables to independent variables and the possible implications. This can be a complicated process. Identify and rank the significant independent variables and their impacts on the dependent variables. The results can reveal high-level and combined variables of a quantitative or qualitative nature.
- c. Error Analysis & Data Review: After experimentation IAW the Experiment Design and data collected IAW with the Data Collection Plan, data should be examined in the following ways:
 - (1) Data correction: identify obviously incorrect data (e.g. not allowed values for measurements) and correct them or remove them from the database.
 - (2) Anomalies/Outlier identification: potential important cases as the evaluation of the causes can uncover new insights. Such (unpredictable) occurrences may need additional time for experimentation.
 - (3) Check assumptions on which the techniques chosen to use depend. Ensure the assumptions are valid.
 - (4) Confirm repeatability of results if possible. The use of a Master Data and Assumption List (MDAL) is applicable here.
 - (5) Check sensitivity. Do high-level/combined variables change significantly for small perturbations in dependent variables?
 - (6) Discuss random and systematic errors. These errors are often attributable to language differences, expertise, inherent system noise, etc.
 - (7) Discuss the sample size and if there are enough trials for statistical significance.

6. CONCLUSIONS

Based primarily on variable analysis, with error analysis caveats, state conclusions in terms of the hypotheses. Support the conclusions by answering the following questions:

- Are the hypotheses supported?
- Are any hypotheses unproved due to null statistical results?
- What conclusions can be drawn about null results?
- Does the concept work in its current form?
- Can the concept be improved?

**IFIB 10-02 Contractor Support to Allied Command Transformation Operational
Experimentation**

ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

7. RECOMMENDATION(S) TO THE CONCEPTUAL MODEL

Develop a recommendation based on the certainty of the results, open issues, and conclusions on how to proceed further with the concept. Depending on the complexity and amount of data, interim results leading to several interpretations shall be documented in the Experiment First Impression Report. The conclusions and recommendations based on analysis shall be documented in the Final Experimentation Report.

8. REFERENCES

**IFIB 10-02 Contractor Support to Allied Command Transformation Operational
Experimentation**

ANNEX E ACT EXPERIMENT DESIGN DOCUMENT (EDD)

ENCLOSURE (5) to ANNEX A

DATA COLLECTION PLAN

“EXPERIMENT Name”

POC: Experiment Analyst, Rank, Org, IVSN / Experiment Lead, Rank, Org, IVSN

NATO WAN email:

UNCLAS E-mail:

1. SCHEDULES FOR OBSERVERS

Describe who shall observe when, where, whom and what. Include coordination of MEL/MIL activation with EXCON and corresponding experiment observers. Prepare alternatives in case of unpredictable occurrences, interfering with the schedule.

2. DATA, SURVEYS & QUESTIONS

For each hypothesis state the corresponding question to be asked and data to be collected – or provide a reference document where they are located. The data to be collected is derived from the Data Analysis Plan. The data, questions, surveys to be collected may be self-contained in one particular area of the experiment, or may spread over several days. Address documentation, recording and archiving procedures.

3. EQUIPMENT

- a. Communication and other infrastructure means (e.g. specific computer workplaces, additional telephones,) that has to be provided by the experiment or hosting organisation to the observers.
- b. (Automated) data collection means, data storage system(s) and mandatory data form(at)s. In case of form(at)s for data collection differing from form(at)s required by the analysis, describe which data conversions will be done.
- c. Interoperability between the connected systems has to be assured and described by testing of technical interfacing and (experimental) working procedures for the observer.

2011 Experiment Proposals - OE Review

		2011 Experiment Proposals - Technical Validation Worksheet	ACT Review	CD&E WG Validation
	CDEMS	Experiment Title		
Effective Engagement/Joint Manoeuvre (EE/JM)				
C-IED Capability				
1	11296 (New)	2011 - EEJM - C-IED SOP Validation		
GEO/METOC				
2	11029 (1512)	2011 - EEJM - Hybrid Underwater Vehicles for Remote and Covert Environmental Awareness		
Information Superiority/NATO Network Enabled Capability (IS/NNEC)				
Interoperability Geospatial and METOC Services				
3	11019 (1511)	2011 - IS/NNEC - REP Technical and Managerial Validation		
Bi-SC AIS Core Information Infrastructure Services				
7	11301 (New)	2011 - IS/NNEC - Bi-SC AIS Core GIS Interfaces With NATO C4ISR Systems		
NNEC Infrastructure Services				
8	11299 (New)	2011 - IS/NNEC - Network Aware Service Oriented Architecture (SOA)		
9	11300 (New)	2011 - IS/NNEC - Validate Service Management and Control Plan		
Deployable Communication Services				
10	11063 (1466)	2011 - IS/NNEC - Network Aware Self Configuring DCIS Node Concept Validation		
11	11064 (540)	2011 - IS/NNEC - DCIS Service Management		
NATO Snow Leopard				
12	11069 (1106)	2011 - IS/NNEC - Multinational Federation II (Snow Leopard)		
NATO and Nations CORE Information Infrastructure Services Improvement				
13	11057 (1477)	2011 - IS/NNEC - ACP 145 Testing with Nations		
Enhanced CIMIC (ECIMIC)				
Civil-Military Interaction				
14	11293 (490)	2011 - CIMIC - Enhanced NATO Civil Support to NATO Military Authorities and Civil Emergency Planning (CEP)		
15	11291 (1489)	2011 - CIMIC - Comprehensive Civil-Military Legal Overview (CCLO)		
16	11292 (1136)	2011 - CIMIC - CIMIC in a Maritime Environment		
17	11295 (616)	2011 - CIMIC - Joint Planning, Execution and Coordination Tools (JPECT) in Civil Military Operations		
18	11294 (New)	2011 - CIMIC - Enhanced Information Sharing for a Comprehensive Approach and CIMIC		
Joint Deployment and Sustainment (Formerly Integrated Logistics and Expeditionary Operations)				
NATO Expeditionary Medical Support				
19	11279 (New)	2011 - IL - Medical Civilian Military Interface		
20	11280 (New)	2011 - IL - MEDICS Clinical Management		
21	11281 (New)	2011 - IL - MEDICS Intelligence		
22	11282 (New)	2011 - IL - MEDICS Management		
23	11283 (New)	2011 - IL - MEDICS NATO/National Integration		
24	11284 (New)	2011 - IL - MEDICS Planning		
25	11285 (New)	2011 - IL - Multinational Medical Certification		
Enhanced NATO Strategic Deployability				
26	10877 (1122)	2011 - EO - Best Deployment Practices		
NATO Logistics Information Management				
27	11017 (1305)	2011 - EO - Web Enabled Deployment Planning		
28	11018 (1306)	2011 - EO - Web Enabled Movement and Transportation Tracking		
Operations Logistics Chain Management (OLCM)				
29	11287 (New)	2011 - IL - OLCM Deployment and Sustainment Business Process Model (BPM)		
30	11286 (New)	2011 - IL - OLCM Interoperability with Nations: Multi-Party Information Exchange		
31	11288 (New)	2011 - IL - OLCM Interoperability with Nations: Physical Deployment and Sustainment Management		
32	10987 (1114.1)	2011 - IL - Sense and Respond Logistics		
NURC POW				
Non-lethal Port Protection				
33	11041 (1642)	2011 - NURC - Port Protection Command and Control (C2)		
34	11278 (New)	2011 - NURC - Optical Distracters for Maritime Force Protection in Ports and Harbours		
35	11040 (245)	2011 - NURC - Small Boat Outer Layer Defence in Port Protection		
Cooperative ASW				
36	11042 (1643)	2011 - NURC - Operational Use of Networked Low Frequency Active Sonar Systems (LFAS)		
Marine Mammal Risk Mitigation				
37	10937 (874)	2011 - NURC - Marine Mammal Risk Mitigation Tools - Operational Assessment		
MNE				
1	11277 (NEW)	Multinational Experiment 7		

ANNEX H

CONTRACTOR JOB DESCRIPTIONS

1. The appendices (1-21) to this annex provide the contractor job descriptions. These descriptions serve to emphasise the specialised services required. Contractors are required for the skill sets specified and not for work of a generalist nature.
2. Core contractor positions are addressed in appendices 1-9. Additional surge positions are described in appendices 10-21.

APPENDIX 1 TO ANNEX H

EXPERIMENTATION PROGRAMME SUPPORT MANAGER 1

1. Duties: Works very closely with the Experimentation Coordinator as a programme support manager to ensure the successful execution of events and attainment of experimentation goals. Has a proven track record of engaging successfully with senior staff officers in a consultancy-type role. Manages the overall contract effort and makes decisions on behalf of the Contractor relating to contract performance. This individual or their designate is authorized to act on behalf of the Contractor for all matters relating to this contract. Evaluates contractor staff performance, resolves problems, defines objectives and priorities, and coordinates and assigns projects and duties for subordinate Contractor personnel and teams. Responsible for quality control and effectiveness of contract support.

Qualifications:

2. Must have at least one year of NATO military secondment or three years of multinational military experience preferably within the last five years.
3. Must possess at least one of the following qualifications:
 - a) Academic Education: Masters of Science degree from an accredited college or university in Management, Engineering, Computer Science, Management of Information Systems (MIS), or physical science in Information Systems Management, Computer Systems Analysis, Operations Research, or Systems Analysis; or Masters degree from an accredited college or university in any discipline with at least five years related experience, or Bachelor of Science degree in any discipline with at least seven years related experience performing a similar type services as a site manager job.
 - b) Management Education: Graduate from a national Senior Service College or an MBA from an accredited college or university.

Experience:

4. Must possess a proven track record in Programme Management in governmental or military environments, including multinational partnering, and five of the following:
 - a) Five years of professional experience managing and applying knowledge of and application of experimentation theory, experience in developing and applying Service and Joint experimentation models and simulation.
 - b) At least three years of experience in the last five years in determining programme objectives and requirements, organizing and scheduling programs and projects, and developing standards and guidelines for experimentation and diverse supporting activities to include applications of models and simulations.
 - c) Demonstrated ability to plan, schedule, and coordinate all phases, including initiation, development, implementation, and maintenance of various large, difficult, and complex experimentation projects and supporting models and simulations simultaneously.
 - d) Three or more years demonstrated experience with joint and service doctrine, to include combat, combat support and/or combat service support operations;

- e) Demonstrated leadership experience with Joint services organizations, operations, and exercises at Brigade, Air Wing or Battlegroup levels;
- f) Demonstrated experience in the preparation and conduct of joint experiments;
- g) Extensive knowledge of and at least five years experience of service and joint/combined staffs organization, functions and procedures;
- h) Demonstrated leadership experience in the preparation and conduct of seminars, study groups and conferences for senior officers;
- i) Demonstrated experience in the conduct of post-exercise effectiveness analysis and evaluations;
- j) Demonstrated experience in the compilation and presentation, in both written and oral formats, of lessons learned and AAR materials.
- k) Five or more years experience in contract management including budgeting, planning, execution, delivery, quality assurance, and reporting.

5. Qualifications needed by all Contractors

- 1. Professional/Experience. General staff skills are required.
- 2. Security Clearance. NATO Secret
- 3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
- 4. Standard Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Working Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Basic Knowledge
- 5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

Appendix 2 TO ANNEX H

PROJECT MANAGER I

1. Duties: Assists with designing and managing experimentation effort within ACT. In particular, his duties will include the processes, planning, coordination, design and production aspects associated with the annual Experimentation Programme of Work (EPOW) and the three-year CD&E Campaign Plan. The incumbent will also be the Assistant Contractor Programme Manager where he would manage the overall contract effort and makes decisions on behalf of the Contractor relating to contract performance. Evaluates contractor staff performance, resolves problems, defines objectives and priorities, and coordinates and assigns projects and duties for subordinate Contractor personnel and teams. Responsible for quality control and effectiveness of contract support.

Qualifications

2. Must have at least one year of NATO military secondment or three years of multinational military experience.
3. Must possess one of the following qualifications:
 - a) Education: Masters of Science degree from an accredited college or university in Management, Engineering, Computer Science, Management of Information Systems (MIS), or physical science in Information Systems Management, Computer Systems Analysis, Operations Research, or Systems Analysis; or Masters degree from an accredited college or university in any discipline with at least five years related experience, or Bachelor of Science degree in any discipline with at least seven years related experience providing similar type services as a Programme Manager.
 - b) Management Education: Graduate from a national Senior Service College or an MBA from an accredited college or university.
4. Must possess a proven track record in Project Management in governmental or military environments, including multinational partnering and at least three of the following:
 - a) Five years of professional experience managing and applying knowledge of and application of experimentation theory, experience in developing and applying Service and Joint experimentation models and simulation.
 - b) At least three years of experience in the last five years in determining program objectives and requirements, organizing and scheduling programs and projects, and developing standards and guidelines for experimentation and diverse supporting activities to include applications of intelligence models and simulations.

- c) Demonstrated ability to plan, schedule, and coordinate all phases, including initiation, development, implementation, and maintenance of various large, difficult, and complex experimentation projects and supporting models and simulations simultaneously.
- d) Three or more years demonstrated experience with joint and service doctrine, to include combat, combat support and/or combat service support operations;
- e) Demonstrated experience with Joint services organizations, operations, and exercises at Brigade, Air Wing or Battlegroup levels;
- f) Demonstrated experience in the preparation and conduct of joint experiments;
- g) Extensive knowledge of and at least five years experience of service and joint/combined staffs organization, functions and procedures;
- h) Demonstrated experience in the preparation and conduct of seminars, study groups and conferences for senior officers;
- i) Demonstrated experience in the conduct of post-exercise effectiveness analysis and evaluations;
- j) Demonstrated experience in the compilation and presentation, in both written and oral formats, of lessons learned and AAR materials.
- k) Five or more years experience in contract management including budgeting, planning, execution, delivery, quality assurance, and reporting.

Qualifications Needed by all Contractors

1. Professional/Experience. General staff skills are required.
2. Security Clearance. NATO Secret
3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
4. Standard Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Working Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Basic Knowledge

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

APPENDIX 3 TO ANNEX H

EXPERIMENTATION PROJECT MANAGER 2

1. Duties: Assists with managing the experimentation effort within ACT. In particular will be involved with external coordinating with ACO, Nations, and research agencies and close internal coordination of Experimentation Programme of Work assembly. Will be responsible for managing the continued development and execution of Operational Experimentation information management and marketing strategies, building partnerships and obtaining customer feedback.

Qualifications

2. Must possess a Bachelors of Science degree from an accredited college or university in Management, Engineering, Computer Science, Management of Information Systems (MIS), or physical science in Information Systems Management, Computer Systems Analysis, Operations Research, or Systems Analysis; or Bachelors degree from an accredited college or university in any discipline with at least five years related experience.

3. Must possess a demonstrated track record of two or more years in project management, within the last five years, and three of the following:

- a) Demonstrated experience of two or more years information and marketing in relation to projects or programmes;
- b) Demonstrated experience with joint and service doctrine, to include combat, combat support and combat service support operations;
- c) Demonstrated experience with combat, and/or combat support and combat service support organizations, operations and exercises for fleet, battle groups or air wings;
- d) Demonstrated experience with Joint services organizations, operations, and exercises at levels comparable to joint field training exercises;
- e) Demonstrated experience in the preparation of scenarios for conducting joint experiments;
- f) Extensive actual knowledge of and experience with service and joint/combined staffs organization, functions and procedures;
- g) Demonstrated experience in the preparation and conduct of seminars, study groups and conferences for senior officers;
- h) Demonstrated experience in conducting instruction in both small and large group formats;
- i) Demonstrated experience in the conduct of post-exercise effectiveness analysis and evaluations;
- j) Demonstrated experience in the compilation and presentation, in both written and oral formats, of lessons learned and AAR materials.

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

4. Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.
2. Security Clearance. NATO Secret
3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
4. Standard Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Working Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Basic Knowledge
5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

APPENDIX 4 TO ANNEX H

EXPERIMENT INTEGRATOR 1

1. Duties. Integrates ACT's capability development Deliverables planning and concepts with experimentation. Provides linkage between experiment sponsors, concept developers and experimenters. Conducts cross-functional experimentation integration, working with Deliverable Directors and their staffs to ensure the optimal, intelligent integration of experimentation into the campaign plans for Deliverables. Reviews Concept proposals and assists concept developers in maturing concepts to a usable stage. Evaluates all prospective Concept proposals against NATO requirements and provides advice on optimal strategies for bringing maximum quantity of prioritised concepts through the experimentation stage. Must be able to communicate innovative ideas clearly and effectively through written and oral presentations. Must maintain a thorough understanding of the intent behind Deliverable planning and provide intelligent, pro-active support to capability development.

Qualifications and Experience

2. Minimum Bachelor's Degree from an accredited college or University.
3. A minimum of 10 years military experience, to include experience in an operational theatre.
4. Must have demonstrated skills in at least two of the five following areas:
 - a) Effective Engagement (application of military and non-military coherent effects)
 - b) Information Superiority/Network Enabled Capability
 - c) Integrated Logistics
 - d) Expeditionary Operations
 - e) Civil Military Cooperation
5. Must meet, based on experience within the last five years, at least five of the following:
 - a) Demonstrated knowledge and experience in defining requirements for the Doctrine, Organizational, Training, Material, Leadership, Personnel, Facilities and Integration (DOTMLPFI) process.
 - b) Demonstrated ability and experience (minimum 2 years) developing/authoring Technical Analysis and resulting reports;
 - c) Demonstrated ability and experience in formulating analysis and design reports;
 - d) Demonstrated ability to evaluate and anticipate future trends/technologies;
 - e) Extensive knowledge of related/associated repositories of operational, current and future military operations information and sources of same;
 - f) Demonstrated skill and experience in requirements analysis, developing alternative recommendations, concept formulation, planning, executing and evaluating technical conferences, workshops, seminars;

g) Demonstrated ability to professionally interface, produce documentation for, provide presentations and speak with authority to senior military and other NATO personnel and organizations;

h) Professional experience interfacing with and defining Joint military requirements;

i) Knowledge and experience in the military experimentation area of operations;

j) Demonstrable knowledge and skill in defining and explaining Future requirements for military operations;

k) Demonstrated ability and expert knowledge of Red Team operations, analysis, and execution;

l) Demonstrated ability to develop and analyze adversary and vulnerabilities capabilities;

6. Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.

2. Security Clearance. NATO Secret

3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge.

a) Word Processing: Working Knowledge

b) Spreadsheet: Working Knowledge

c) Graphics presentation: Working Knowledge

d) Database: Basic Knowledge

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

APPENDIX 5 TO ANNEX H

EXPERIMENTER 1

1. Duties: Serves as contractor team support leader for major experimentation project(s). Responsible for managing project efforts, including planning, experiment design, defining objectives and priorities, evaluating performance, resolving problems, establishing quality control procedures, assigning duties, supervising assigned contract personnel, and coordinating with ACT and other contractor personnel.

Qualifications

2. Masters of Science degree from an accredited college or university, with five years experience in military experimentation. Or, a Bachelor of Science degree from an accredited college or university supplemented with five years experience in the analysis of events supporting military transformation.

3. Must have at least one year of NATO military secondment or three years of multinational military experience.

4. Experience requirements are in addition to those required in paragraphs 2&3 above. Experience, within the last five years, in at least two of the following:

- a) Three years experience in experimentation theory, design, and application;
- b) Three years experience in planning, scheduling and coordinating experimentation activities;
- c) Three years experience in experimentation methodology and data base preparation;
- d) Three years experience in the development of analytical test plans and procedures;
- e) Three years experience in the joint planning process.

5. Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.

2. Security Clearance. NATO Secret

3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge.

- a) Word Processing: Working Knowledge
- b) Spreadsheet: Working Knowledge
- c) Graphics presentation: Working Knowledge
- d) Database: Basic Knowledge

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

APPENDIX 6 TO ANNEX H

EXPERIMENTER 2

1. Duties: Responsible for managing support of experimentation projects, including planning, defining objectives and priorities, resolving problems, establishing quality control procedures, and coordinating with ACT and other contractor personnel.

Qualifications

2. Bachelor of Science, or Bachelor of Arts degree from an accredited college or university with three years experience in military experimentation.

3. Experience requirements are in addition to those required in paragraphs 2&3 above. Experience, within the last five years, in at least two of the following:

- a) Three years experience in experimentation theory, design, and application;
- b) Three years experience in planning, scheduling and coordinating experimentation activities;
- c) Three years experience in experimentation methodology and data base preparation;
- d) Three years experience in the development of analytical test plans and procedures;
- e) Three years experience in the joint planning process.

4. Qualifications Needed by all Contractors

1. Professional/Experience. General staff skills are required.

2. Security Clearance. NATO Secret

3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge.

- a) Word Processing: Working Knowledge
- b) Spreadsheet: Working Knowledge
- c) Graphics presentation: Working Knowledge
- d) Database: Basic Knowledge

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

APPENDIX 7 TO ANNEX H

EXPERIMENT ANALYST I

1. Post Context: Senior Experiment Analyst serving in the Operational Experimentation Branch to provide analysis to ACT experimentation. Routinely assigned to Operational Analysis (OA) Branch, working alongside military and NATO International Civilian analysts. Reports to Branch Head OA for analysis technical matters.
2. Duties: Conduct appropriate analysis in support of the design and conduct of experiments in the ACT experimentation programme. Provide analytical support to experimentation projects to include formulation of experiment aims and objectives, data collection plans, analysis plans, appropriate concept development, solution finding, stakeholder analysis, risk assessment and evaluation of operational benefits of experimentation efforts for NATO's future capability. Serve as an analyst team leader and supervise other contractor analysts through contributions to planning of experiments, quality control procedures, assigning duties and coordinating with other ACT and Contractor personnel.
3. Essential Qualifications:
 - a) At least one year of NATO military secondment or three years of multinational military experience. Demonstrated team leader management skills and supervision over other analysts.
 - b) Bachelor's degree from an accredited college or university in operations research, systems analysis, engineering, computer science or other relevant computational science discipline, with three years experience in the analysis of military operations, effectiveness of military systems, procedures, organization and/or material, and/or military concept development and experimentation.
 - c) Experience – in addition to those required in paragraph a) – to include:
 - i) At least three years experience in experimentation theory, methodology, and development, and its application to analysis in operational settings such as exercises, tests and demonstrations, simulations and games.
 - ii) At least three additional years experience in planning, scheduling and coordinating experimentation activities in support of analyses, and at least one year additional experience in military computer modeling and data base design.
4. Desirable Qualifications:
 - a) Demonstrated experience in the preparation of scenarios for joint experimentation events;

- b) Demonstrated experience in the conduct of post experimentation event effectiveness analysis and evaluations.

Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.
2. Security Clearance. NATO Secret
3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
4. Extended Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Extended Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Extended Knowledge
5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

APPENDIX 8 TO ANNEX H

EXPERIMENT ANALYST II

1. Post Context: Experiment Analyst serving in the Operational Experimentation Branch to provide analysis to ACT experimentation. Routinely assigned to Operational Analysis (OA) Branch, working alongside military and NATO International Civilian analysts. Reports to Branch Head OA for analysis technical matters.
2. Duties: Conduct appropriate analysis in support of the design and conduct of experiments in the ACT experimentation program. Provide analytical support to experimentation projects to include formulation of experiment aims and objectives, data collection plans, analysis plans, appropriate concept development, solution finding, stakeholder analysis, risk assessment and evaluation of operational benefits of experimentation efforts for NATO's future capability. Serve as an analyst team member and contribute to planning of experiments and quality control procedures, coordinating efforts with other ACT and Contractor personnel.
3. Essential Qualifications:
 - a) Bachelor's degree from an accredited college or university in operations research, systems analysis, engineering, computer science or other relevant computational science discipline, with two years experience in the analysis of military operations, effectiveness of military systems, procedures, organization and/or material, and/or military concept development and experimentation.
 - b) Experience – in addition to those required in paragraph a) – to include:
 - i) At least two years experience in experimentation theory, methodology and development, and its application to analysis in operational settings such as exercises, tests and demonstrations, simulations and games.
 - ii) At least two additional years experience in planning, scheduling and coordinating experimentation activities in support of analyses, and at least one year additional experience in military computer modeling and data base design.
4. Desirable Qualifications:
 - a) Demonstrated experience in the preparation of scenarios for joint experimentation events;
 - b) Demonstrated experience in the conduct of post experimentation event effectiveness analysis and evaluations.

Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.

2. Security Clearance. NATO Secret
3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
4. Extended Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Extended Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Extended Knowledge
5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

APPENDIX 9 TO ANNEX H

EXPERIMENTATION KNOWLEDGE MANAGER

1. Duties – Maintain and support continued improvement of the Concept Development and Experimentation Management System (CDEMS) and other nominated systems on behalf of Operational Experimentation Branch. Work with stakeholders from across the ACT staff to capture and document requirements. Coordinate with the NATO CIS Services Agency (NCSA) and ACT Office of Security (AOS) on CDEMS and other systems related issues, including implementation of improvements and upgrades. Act as CDEMS System Administrator, which includes creating user accounts, resetting passwords, reviewing/updating CDEMS web pages, and other technical support as required. Act as Operational Experimentation Branch advisor and representative for IT related issues, including issues relating to the ACT Document Handling System (DHS). Maintain the Operational Experimentation Support Contractor Team website on the ACT Homepage on NSWAN, as well as the OE Web Portal within DHS.

2. Qualifications. Technical Qualifications correspond to Labour Category Technology Engineer/Analyst at Appendix 13 to Annex H.

3. Standard Automated Data Processing (ADP) Knowledge.

- a) Word Processing: Advanced Knowledge
- b) Spreadsheet: Advanced Knowledge
- c) Graphics presentation: Basic Knowledge
- d) Database: Advanced Knowledge

4. Qualifications Needed by all Contractors

- 1. Professional/Experience. General staff skills are required.
- 2. Security Clearance. NATO Secret
- 3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

APPENDIX 10 TO ANNEX H

INFORMATION TECHNOLOGY ASSOCIATE

Duties: Evaluates relevancy of emerging technology to experimentation process and management support. Translates functional requirements into technical capability requirements or system designs. Applies new and emerging technologies to the system development process. Must be knowledgeable in performing process, systems, and integration requirements analysis horizontally and vertically across a mission space for the development of tools and systems for tracking requirements and managing experimentation and research and development processes. Must be knowledgeable in implementing computer systems in a phased approach from requirements analysis through lifecycle support. Applies, as appropriate, activity and data modeling transaction flow analysis; internal control and risk analysis; modern business methods; and performance measurement techniques. Assists in establishing standards for information system performance. Participates in the development and application of organization wide information models for use in designing and building integrated, shared software and database management systems. Must be able to present technology evaluations or system designs at formal reviews. Must be able to work independently.

Education: M.A. / M.S. degree with 10 years or B.A / B.S. degree with 15 or more years experience in a related field.

Basic Experience: Must have 10 years of computer systems experience from at least two of the following disciplines: functional or data requirement analysis, system analysis, system design, development management, application programming, technology analysis, and systems integration.

Specialized Experience: At least 10 years of experience including information system development, functional requirement analysis, technology evaluation, and IT Governance.

Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.
2. Security Clearance. NATO Secret
3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
4. Standard Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Working Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Basic Knowledge

**IFIB 10-02 Contractor Support to Allied Command Transformation Operational
Experimentation**

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

APPENDIX 11 TO ANNEX H

ADVANCED TECHNOLOGY ENGINEER

Duties: Leads the translation of functional requirements into system, network or software solutions using emerging and available technology. Must be able to apply new and emerging technologies to meet client needs for managing exercise, experimentation, and research and development activities. Must be capable of using third- and fourth-generation or current state-of-the-art IT equipment, tools and languages to develop and prepare diagrammatic plans for solution of business, management, communications, tactical, and strategic problems such as coordinating activities and budget planning across multiple programs of work. Must be able to design detailed programs, flowcharts, and diagrams. Must be able to write or edit functional descriptions, system specifications, user manuals, and special reports or other documents. Develop plans for IT development, systems integration, communications, or technology evaluation projects from inception to conclusion.

Education: B.A. / B.S. degree with 5 years of experience in a related field or AA / AS degree with 10 years experience in a related field.

Basic Experience: Must have 5 years of computer experience across at least two of the following disciplines: systems analysis, systems design, application programming, network engineering and equipment or technology analysis.

Specialized Experience: At least 5 years of experience either as a system integrator, network engineer, systems software specialist or as a systems analyst with duties to include recommending state-of-the-art computer hardware and software and its ability to support specific requirements. At least 3 years of experience working with security accreditation processes and procedures.

Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.
2. Security Clearance. NATO Secret
3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
4. Standard Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Working Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Basic Knowledge
5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

APPENDIX 12 TO ANNEX H

SENIOR COMPUTER/SOFTWARE ENGINEER

Duties: Translates functional requirements into system, network or software solutions using emerging and available technology. Must be able to apply new and emerging technologies to meet client needs for managing exercise, experimentation, and research and development activities. Must be capable of using third- and fourth-generation or current state-of-the-art IT equipment, tools and languages to develop and prepare diagrammatic plans for solution of business, management, communications, tactical, and strategic problems such as coordinating activities and budget planning across multiple programs of work. Must be able to design detailed programs, flowcharts, and diagrams. Must be able to write or edit functional descriptions, system specifications, user manuals, and special reports or other documents. Develops plans for IT development, systems integration, communications, or technology evaluation projects from inception to conclusion.

Education: A.A. / A.S. degree with 5 years of experience in a related field or High School diploma with 7 years experience in a related field.

Basic Experience: Must have 3 years of computer experience across at least two of the following disciplines: systems analysis, systems design, application programming, network engineering and equipment or technology analysis.

Specialized Experience: At least 3 years of experience either as a system integrator, network engineer, systems software specialist or as a systems analyst with duties relating to the evaluation state-of-the-art computer hardware and software and its ability to support specific requirements.

. Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.
2. Security Clearance. NATO Secret
3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
4. Standard Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Working Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Basic Knowledge
5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

IFIB 10-02 Contractor Support to Allied Command Transformation Operational Experimentation

APPENDIX 13 TO ANNEX H

TECHNOLOGY ENGINEER/ANALYST

Duties: Assist and support team leadership in definition of functional requirements for into system, network or software solutions using emerging and available technology. Understand new and emerging technologies concepts and apply their usage to experimentation support and management processes. Must be able to write functional descriptions, system specifications, user manuals, and special reports or other documents. Develop plans for IT development, systems integration, communications, or technology evaluation projects from inception to conclusion.

Education: A.A. / A.S. degree with 2 year of experience in a related field or High School diploma with 4 years of experience in a related field.

Basic Experience: Must have 1 year of computer experience in one of the following disciplines: systems analysis, systems design, application programming, network engineering and equipment or technology analysis.

Specialized Experience: 1 year of experience in one of the following: working in or assisting with system integration; network installation or engineering; systems software documentation; system software requirement definition; system software development; or as a systems analyst with duties relating to the evaluation of third- and fourth-generation or state-of-the-art computer hardware and software and its ability to support specific requirements.

. Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.
2. Security Clearance. NATO Secret
3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
4. Standard Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Working Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Basic Knowledge
5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

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APPENDIX 14 TO ANNEX H

JUNIOR TECHNOLOGY ENGINEER/ANALYST

Duties: Assist and support team in definition of functional requirements for system, network or software solutions using emerging and available technology. Research new and emerging technologies and concepts for use in experimentation support and management processes. Must be able to write user manuals, special reports and technical documents. Support the development of plans for IT systems integration, communications, or technology evaluation projects.

Education: High School diploma with 1 year of experience in a related field or High School diploma and enrolled in an institution of higher learning in a related field.

Basic Experience: Must have 1 year of computer experience or enrolled in formal education in one of the following disciplines: systems analysis, systems design, application programming, network engineering or technology analysis.

Specialized Experience: Knowledge or course of study in one of the following: system integration; network installation or engineering; systems software documentation; system software requirement definition; system software development; or as a systems analyst.

Qualifications needed by all Contractors

1. Professional/Experience. General staff skills are required.
2. Security Clearance. NATO Secret
3. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory
4. Standard Automated Data Processing (ADP) Knowledge.
 - a) Word Processing: Working Knowledge
 - b) Spreadsheet: Working Knowledge
 - c) Graphics presentation: Working Knowledge
 - d) Database: Basic Knowledge
5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately four to five times per year for periods of approximately one to two weeks.

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APPENDIX 15 TO ANNEX H

CIVIL MILITARY KNOWLEDGE MANAGERS

The following Appendices (15-21) address surge positions used in fulfilling experimentation with a Civil Military Fusion Centre which has formed part of ACT's Civil Military Interaction experimentation campaign directed at selected aspects of a Comprehensive Approach.

KNOWLEDGE MANAGER I

I. Duties. Serves as a consultant and Knowledge Manager (KM) for a major Civil-Military Cooperation (CIMIC) experimentation project. Knowledge Managers are functional specialists and maintain administrative responsibility and accountability for their functional domain area, a sector, and provide linkages between the Civil-military Fusion Centre (CFC) and relevant Subject Matter Experts (SME). KMs are familiar and experienced within their domain area as well as with Information and Knowledge Management (IKM) methodologies, but generally are not expected to be SMEs on any specific domain subject. As such, Sector KMs are responsible for gathering, assessing, collating, processing (making information easier to consume), and displaying on the Civil-Military Overview (CMO) web portal all the relevant information regarding their sector of responsibility. KMs will be able to maintain any of the sectors in the CMO, but will be responsible for a primary sector and a secondary sector, as assigned by the Chief KM. Additionally the KM1 should be able to assume a leadership position for a regional or sector team in the fusion centre.

The KMs will work in the following sectors:

- **Economic Development:** Responsible for providing useful and intuitive information on Employment Generation; Monetary Policy, Fiscal Policy and Governance, General Economic Policy, Financial Sector, Debt, Trade, Market Economy, Legal and Regulatory Reform, Agricultural Development, and Social Safety Net.
- **Governance and Participation:** Responsible for providing useful and intuitive Governance and Participation information to include, but not limited to: national, territorial and local governance, executive authority, legislature, anti-corruption, elections, political parties and process, civil society and media.
- **Humanitarian Assistance:** Responsible for providing useful and intuitive humanitarian cluster information to include, but not limited to: refugees and internally displaced persons, food security, shelters, humanitarian de-mining, logistics, emergency telecommunications, health, nutrition, water/sanitation/hygiene, camp coordination and management.
- **Infrastructure:** Responsible for providing useful and intuitive Infrastructure information to include, but not limited to: Transportation lines (ports, roads, bridges, etc.), Telecommunications, Energy, and General Infrastructure.
- **Justice and Reconciliation:** Responsible for providing useful and intuitive Justice and Reconciliation information to include, but not limited to: Interim Criminal Justice System, Indigenous Police, Judicial Personnel and Infrastructure, Property, Legal

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System Reform, Human Rights, Corrections, War Crime Courts and Tribunals, Truth Commissions and Remembrance, and Community Rebuilding.

- **Social Well-Being:** Responsible for providing useful and intuitive Social Well-Being information to include, but not limited to: Public Health, Education, Social Protection, Assessment, Analysis and Reporting, Public Information and Communications (Note: This sector may have some overlap with the Humanitarian Assistance sector, but focuses on long-term development vice short term issues).

Since the CFC/CMO project is part of a Concept Development and Experimentation campaign, KMs must be flexible and understand that duties and responsibilities may change to meet the evolving requirements of the project. They will also be asked to contribute to the development of the concept and tools, in addition to developing the CFCs Standard Operating Procedures (SOP).

2. Qualifications:

1. PhD. or Masters Degree in International Affairs, Political Science, History, Economics/Finance, Sociology, or Anthropology. (Note: Other degrees may be taken into account depending on the strength of their other qualifications) or International Law degree from an accredited college or university, with three years experience in a Sector (listed above) associated with International Organizations (IO) or Non-governmental Organizations (NGO).

2. Meet at least two of the following criteria:

- a. Two years of in-the-field experience with a recognized IO/NGO.
- b. Able to read, write or communicate in any of the main native languages in Afghanistan or Northeast Africa
- c. One year experience in how to leverage Information Technology to improve information sharing
- d. One year experience in the Afghanistan or Northeast Africa area of operations.
- e. Three years of multinational CIMIC experience.

3. Qualifications Needed by all Consultants:

- a. Professional/Experience. General staff skills are required.
- b. Flexibility and ability to work in a collaborative group environment.
- c. Security Clearance. None
- d. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge: very comfortable working with

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a computer and:

- a. Word Processing: Working Knowledge
- b. Spreadsheet: Working Knowledge
- c. Graphics presentation: Working Knowledge
- d. Database: Basic Knowledge
- e. Internet search: Proficient

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately two times per year for periods of approximately one to two weeks.

KNOWLEDGE MANAGER II

1. Duties. Serves as a consultant and Knowledge Manager (KM) for a major Civil-Military Collaboration (CIMIC) experimentation project. Knowledge Managers are functional specialists and maintain administrative responsibility and accountability for their functional domain area, a sector, and provide linkages between the Civil-military Fusion Centre (CFC) and relevant Subject Matter Experts (SME). KMs are familiar and experienced within their domain area as well as with Information and Knowledge Management (IKM) methodologies, but generally are not expected to be SMEs on any specific domain subject. As such, Sector KMs are responsible for gathering, assessing, collating, processing (making information easier to consume), and displaying on the Civil-Military Overview (CMO) web portal all the relevant information regarding their sector of responsibility. KMs will be able to maintain any of the sectors in the CMO, but will be responsible for a primary sector and a secondary sector, as assigned by the Chief KM. Additionally the KM2 should be able to assume a leadership position for a regional or sector team in the fusion centre.

The KMs will work in the following sectors:

- **Economic Development:** Responsible for providing useful and intuitive information on Employment Generation; Monetary Policy, Fiscal Policy and Governance, General Economic Policy, Financial Sector, Debt, Trade, Market Economy, Legal and Regulatory Reform, Agricultural Development, and Social Safety Net.
- **Governance and Participation:** Responsible for providing useful and intuitive Governance and Participation information to include, but not limited to: national, territorial and local governance, executive authority, legislature, anti-corruption, elections, political parties and process, civil society and media.
- **Humanitarian Assistance:** Responsible for providing useful and intuitive humanitarian cluster information to include, but not limited to: refugees and internally displaced persons, food security, shelters, humanitarian de-mining, logistics, emergency telecommunications, health, nutrition, water/sanitation/hygiene, camp coordination and management.
- **Infrastructure:** Responsible for providing useful and intuitive Infrastructure information to include, but not limited to: Transportation lines (ports, roads, bridges, etc.), Telecommunications, Energy, and General Infrastructure.
- **Justice and Reconciliation:** Responsible for providing useful and intuitive Justice and Reconciliation information to include, but not limited to: Interim Criminal Justice System, Indigenous Police, Judicial Personnel and Infrastructure, Property, Legal System Reform, Human Rights, Corrections, War Crime Courts and Tribunals, Truth Commissions and Remembrance, and Community Rebuilding.
- **Social Well-Being:** Responsible for providing useful and intuitive Social Well-Being information to include, but not limited to: Public Health, Education, Social Protection, Assessment, Analysis and Reporting, Public Information and Communications (Note:

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This sector may have some overlap with the Humanitarian Assistance sector, but focuses on long-term development vice short term issues).

Since the CFC/CMO project is part of a Concept Development and Experimentation campaign, KMs must be flexible and understand that duties and responsibilities may change to meet the evolving requirements of the project. They will also be asked to contribute to the development of the concept and tools, in addition to developing the CFCs Standard Operating Procedures (SOP).

2. Qualifications:

1. Masters or Bachelors Degree in International Affairs, Political Science, History, Economics/Finance, Sociology, or Anthropology. (Note: Other degrees may be taken into account depending on the strength of their other qualifications) from an accredited college or university, with two years experience in a Sector (listed above) associated with International Organizations (IO) or Non-governmental Organizations (NGO).

2. Meet at least two of the following criteria:

- a. One year of in-the-field experience with a recognized IO/NGO.
- b. Able to read, write or communicate in any of the main native languages in Afghanistan or Northeast Africa.
- c. One year experience in how to leverage Information Technology to improve information sharing
- d. Six months experience in the Afghanistan or Northeast Africa area of operations.
- e. Two years of multinational CIMIC experience.

3. Qualifications Needed by all Consultants:

- a. Professional/Experience. General staff skills are required.
- b. Flexibility and ability to work in a collaborative group environment.
- c. Security Clearance. None
- d. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge: very comfortable working with a computer and:

- a. Word Processing: Working Knowledge
- b. Spreadsheet: Working Knowledge
- c. Graphics presentation: Working Knowledge

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d. Database: Basic Knowledge

e. Internet search: Proficient

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately two times per year for periods of approximately one to two weeks.

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KNOWLEDGE MANAGER III

I. Duties. Serves as a consultant and Knowledge Manager (KM) for a major Civil-Military Collaboration (CIMIC) experimentation project. Knowledge Managers are functional specialists and maintain administrative responsibility and accountability for their functional domain area, a sector, and provide linkages between the Civil-military Fusion Centre (CFC) and relevant Subject Matter Experts (SME). KMs are familiar and experienced within their domain area as well as with Information and Knowledge Management (IKM) methodologies, but generally are not expected to be SMEs on any specific domain subject. As such, Sector KMs are responsible for gathering, assessing, collating, processing (making information easier to consume), and displaying on the Civil-Military Overview (CMO) web portal all the relevant information regarding their sector of responsibility. KMs will be able to maintain any of the sectors in the CMO, but will be responsible for a primary sector and a secondary sector, as assigned by the Chief KM.

The KMs will work in the following sectors:

- **Economic Development:** Responsible for providing useful and intuitive information on Employment Generation; Monetary Policy, Fiscal Policy and Governance, General Economic Policy, Financial Sector, Debt, Trade, Market Economy, Legal and Regulatory Reform, Agricultural Development, and Social Safety Net.
- **Governance and Participation:** Responsible for providing useful and intuitive Governance and Participation information to include, but not limited to: national, territorial and local governance, executive authority, legislature, anti-corruption, elections, political parties and process, civil society and media.
- **Humanitarian Assistance:** Responsible for providing useful and intuitive humanitarian cluster information to include, but not limited to: refugees and internally displaced persons, food security, shelters, humanitarian de-mining, logistics, emergency telecommunications, health, nutrition, water/sanitation/hygiene, camp coordination and management.
- **Infrastructure:** Responsible for providing useful and intuitive Infrastructure information to include, but not limited to: Transportation lines (ports, roads, bridges, etc.), Telecommunications, Energy, and General Infrastructure.
- **Justice and Reconciliation:** Responsible for providing useful and intuitive Justice and Reconciliation information to include, but not limited to: Interim Criminal Justice System, Indigenous Police, Judicial Personnel and Infrastructure, Property, Legal System Reform, Human Rights, Corrections, War Crime Courts and Tribunals, Truth Commissions and Remembrance, and Community Rebuilding.
- **Social Well-Being:** Responsible for providing useful and intuitive Social Well-Being information to include, but not limited to: Public Health, Education, Social Protection, Assessment, Analysis and Reporting, Public Information and Communications (Note: This sector may have some overlap with the Humanitarian Assistance sector, but focuses on long-term development vice short term issues).

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Since the CFC/CMO project is part of a Concept Development and Experimentation campaign, KMs must be flexible and understand that duties and responsibilities may change to meet the evolving requirements of the project. They will also be asked to contribute to the development of the concept and tools, in addition to developing the CFCs Standard Operating Procedures (SOP).

2. Qualifications:

1. Masters or Bachelors Degree in International Affairs, Political Science, History, Economics/Finance, Sociology, or Anthropology. (Note: Other degrees may be taken into account depending on the strength of their other qualifications) from an accredited college or university, with two years experience in a Sector (listed above) associated with International Organizations (IO) or Non-governmental Organizations (NGO).

2. Meet at least two of the following criteria:

- a. One year of in-the-field experience with a recognized IO/NGO.
- b. Able to read, write or communicate in any of the main native languages in Afghanistan or Northeast Africa.
- c. One year experience in how to leverage Information Technology to improve information sharing
- d. Six months experience in the Afghanistan or Northeast Africa area of operations.
- e. Two years of multinational CIMIC experience.

3. Qualifications Needed by all Consultants:

- a. Professional/Experience. General staff skills are required.
- b. Flexibility and ability to work in a collaborative group environment.
- c. Security Clearance. None
- d. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge: very comfortable working with a computer and:

- a. Word Processing: Working Knowledge
- b. Spreadsheet: Working Knowledge
- c. Graphics presentation: Working Knowledge
- d. Database: Basic Knowledg

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e. Internet search: Proficient

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately two times per year for periods of approximately one to two weeks.

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TECHNICAL KNOWLEDGE MANAGER III

1. Duties. A Technical Knowledge Manager (TKM) will support Operational Experimentation Branch, be responsible for the development and progression of the Civil-Military Fusion Centre (CFC) and Civil-Military Overview (CMO) operational experimental prototype. A TKM serves as a consultant and Knowledge Manager for a major Civil-Military Collaboration (CIMIC) experimentation project. Knowledge Managers are functional specialists and maintain administrative responsibility and accountability for their functional domain area, and provide linkages between the Civil-military Fusion Centre (CFC) and relevant Subject Matter Experts (SME). TKMs are familiar and experienced within their domain area as well as with Information and Knowledge Management (IKM) methodologies, but generally are not expected to be SMEs on any specific domain subject. TKMs are responsible for gathering, assessing, collating, processing (making information easier to consume) data, and supporting the output of the Civil-Military Overview (CMO) web portal. Specific duties include;

- Identify, develop and recommend the tools and products necessary to continually improve the operations of the CMO (i.e. ensure the CMO responds effectively and efficiently to the needs of the users);
- Prepare outreach/marketing materials, maintain the CFC/CMO contact database and make recommendations to management on the composition of CFC/CMO presentations and outreach products; and
- Support the efforts to advance the CFC/CMO experiment, including the CMO Experiment Crisis Pages that focus on the seven sectors (Economic Development, Governance & Participation, Humanitarian Assistance, Infrastructure, Justice and Reconciliation, Security and Social Well-being) or four themes (Geopolitical Developments, Security and Conflicts, Humanitarian Assistance and Human Rights and Justice).

Since the CFC/CMO project is part of a Concept Development and Experimentation campaign, KMs must be flexible and understand that duties and responsibilities may change to meet the evolving requirements of the project. They will also be asked to contribute to the development of the concept and tools, in addition to developing the CFCs Standard Operating Procedures (SOP).

2. Qualifications

1. PhD. or Masters Degree in International Affairs, Political Science, History, Economics/Finance, Sociology, or Anthropology. (Note: Other degrees may be taken into account depending on the strength of their other qualifications) or International Law degree from an accredited college or university.

2. Meet at least two of the following criteria:

- a. One year of in-the-field experience with a recognized IO/NGO.

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- b. Able to read, write or communicate in any of the main native languages in Afghanistan or Northeast Africa.
- c. One year experience in how to leverage Information Technology to improve information sharing
- d. Six months experience in the Afghanistan or Northeast Africa area of operations.
- e. Two years of multinational CIMIC experience.

3. Qualifications needed by all Consultants:

- a. Professional/Experience. General staff skills are required.
- b. Flexibility and ability to work in a collaborative group environment.
- c. Security Clearance. None
- d. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge: very comfortable working with a computer and:

- a. Word Processing: Working Knowledge
- b. Spreadsheet: Working Knowledge
- c. Graphics presentation: Working Knowledge
- d. Database: Basic Knowledge
- e. Internet search: Proficient

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately two times per year for periods of approximately one to two weeks.

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APPENDIX 19 TO ANNEX H

KNOWLEDGE MANAGER IV

1. Duties. Serves as a consultant and Knowledge Manager (KM) for a major Civil-Military Collaboration (CIMIC) experimentation project. Knowledge Managers are functional specialists and maintain administrative responsibility and accountability for their functional domain area, a sector, and provide linkages between the Civil-military Fusion Centre (CFC) and relevant Subject Matter Experts (SME). KMs are familiar and experienced within their domain area as well as with Information and Knowledge Management (IKM) methodologies, but generally are not expected to be SMEs on any specific domain subject. As such, Sector KMs are responsible for gathering, assessing, collating, processing (making information easier to consume), and displaying on the Civil-Military Overview (CMO) web portal all the relevant information regarding their sector of responsibility. KMs will be able to maintain any of the sectors in the CMO, but will be responsible for a primary sector and a secondary sector, as assigned by the Chief KM.

The KMs will work in the following sectors:

- **Economic Development:** Responsible for providing useful and intuitive information on Employment Generation; Monetary Policy, Fiscal Policy and Governance, General Economic Policy, Financial Sector, Debt, Trade, Market Economy, Legal and Regulatory Reform, Agricultural Development, and Social Safety Net.
- **Governance and Participation:** Responsible for providing useful and intuitive Governance and Participation information to include, but not limited to: national, territorial and local governance, executive authority, legislature, anti-corruption, elections, political parties and process, civil society and media.
- **Humanitarian Assistance:** Responsible for providing useful and intuitive humanitarian cluster information to include, but not limited to: refugees and internally displaced persons, food security, shelters, humanitarian de-mining, logistics, emergency telecommunications, health, nutrition, water/sanitation/hygiene, camp coordination and management.
- **Infrastructure:** Responsible for providing useful and intuitive Infrastructure information to include, but not limited to: Transportation lines (ports, roads, bridges, etc.), Telecommunications, Energy, and General Infrastructure.
- **Justice and Reconciliation:** Responsible for providing useful and intuitive Justice and Reconciliation information to include, but not limited to: Interim Criminal Justice System, Indigenous Police, Judicial Personnel and Infrastructure, Property, Legal System Reform, Human Rights, Corrections, War Crime Courts and Tribunals, Truth Commissions and Remembrance, and Community Rebuilding.
- **Social Well-Being:** Responsible for providing useful and intuitive Social Well-Being information to include, but not limited to: Public Health, Education, Social Protection, Assessment, Analysis and Reporting, Public Information and Communications (Note: This sector may have some overlap with the Humanitarian Assistance sector, but focuses on long-term development vice short term issues).

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Since the CFC/CMO project is part of a Concept Development and Experimentation campaign, KMs must be flexible and understand that duties and responsibilities may change to meet the evolving requirements of the project. They will also be asked to contribute to the development of the concept and tools, in addition to developing the CFCs Standard Operating Procedures (SOP).

2. Qualifications:

1. Bachelors Degree in International Affairs, Political Science, History, Economics/Finance, Sociology, or Anthropology. (Note: Other degrees may be taken into account depending on the strength of their other qualifications) from an accredited college or university, with one year experience in a Sector (listed above) associated with International Organizations (IO) or Non-governmental Organizations (NGO).

2. Meet at least two of the following criteria:

- a. One year of in-the-field experience with a recognized IO/NGO.
- b. Able to read, write or communicate in any of the main native languages in Afghanistan or Northeast Africa.
- c. One year experience in how to leverage Information Technology to improve information sharing
- d. Three months experience in the Afghanistan or Northeast Africa area of operations.
- e. One year of multinational CIMIC experience.

3. Qualifications needed by all Consultants:

- a. Professional/Experience. General staff skills are required.
- b. Flexibility and ability to work in a collaborative group environment.
- c. Security Clearance. None
- d. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge: very comfortable working with a computer and:

- a. Word Processing: Working Knowledge
- b. Spreadsheet: Working Knowledge
- c. Graphics presentation: Working Knowledge
- d. Database: Basic Knowledg

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e. Internet search: Proficient

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately two times per year for periods of approximately one to two weeks.

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APPENDIX 20 TO ANNEX H

KNOWLEDGE MANAGER V

1. Duties: Serves as a consultant and Knowledge Manager (KM) for a major Civil-Military Collaboration (CIMIC) experimentation project. Knowledge Managers are functional specialists and maintain administrative responsibility and accountability for their functional domain area, a sector, and provide linkages between the Civil-military Fusion Centre (CFC) and relevant Subject Matter Experts (SME). KMs are familiar and experienced within their domain area as well as with Information and Knowledge Management (IKM) methodologies, but generally are not expected to be SMEs on any specific domain subject. As such, Sector KMs are responsible for gathering, assessing, collating, processing (making information easier to consume), and displaying on the Civil-Military Overview (CMO) web portal all the relevant information regarding their sector of responsibility. KMs will be able to maintain any of the sectors in the CMO, but will be responsible for a primary sector and a secondary sector, as assigned by the Chief KM.

The KMs will work in the following sectors:

- **Economic Development:** Responsible for providing useful and intuitive information on Employment Generation; Monetary Policy, Fiscal Policy and Governance, General Economic Policy, Financial Sector, Debt, Trade, Market Economy, Legal and Regulatory Reform, Agricultural Development, and Social Safety Net.
- **Governance and Participation:** Responsible for providing useful and intuitive Governance and Participation information to include, but not limited to: national, territorial and local governance, executive authority, legislature, anti-corruption, elections, political parties and process, civil society and media.
- **Humanitarian Assistance:** Responsible for providing useful and intuitive humanitarian cluster information to include, but not limited to: refugees and internally displaced persons, food security, shelters, humanitarian de-mining, logistics, emergency telecommunications, health, nutrition, water/sanitation/hygiene, camp coordination and management.
- **Infrastructure:** Responsible for providing useful and intuitive Infrastructure information to include, but not limited to: Transportation lines (ports, roads, bridges, etc.), Telecommunications, Energy, and General Infrastructure.
- **Justice and Reconciliation:** Responsible for providing useful and intuitive Justice and Reconciliation information to include, but not limited to: Interim Criminal Justice System, Indigenous Police, Judicial Personnel and Infrastructure, Property, Legal System Reform, Human Rights, Corrections, War Crime Courts and Tribunals, Truth Commissions and Remembrance, and Community Rebuilding.
- **Social Well-Being:** Responsible for providing useful and intuitive Social Well-Being information to include, but not limited to: Public Health, Education, Social Protection, Assessment, Analysis and Reporting, Public Information and Communications (Note: This sector may have some overlap with the Humanitarian Assistance sector, but focuses on long-term development vice short term issues).

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Since the CFC/CMO project is part of a Concept Development and Experimentation campaign, KMs must be flexible and understand that duties and responsibilities may change to meet the evolving requirements of the project. They will also be asked to contribute to the development of the concept and tools, in addition to developing the CFCs Standard Operating Procedures (SOP).

2. Qualifications:

1. Bachelors Degree in International Affairs, Political Science, History, Economics/Finance, Sociology, or Anthropology. (Note: Other degrees may be taken into account depending on the strength of their other qualifications) from an accredited college or university, with an understanding of the Sectors listed above.

2. Meet at least one of the following criteria:

- a. Six months of in-the-field experience with a recognized IO/NGO.
- b. Able to read, write or communicate in any of the main native languages in Afghanistan or Northeast Africa.
- c. Six months experience in how to leverage Information Technology to improve information sharing
- d. Three months experience in the Afghanistan or Northeast Africa area of operations.
- e. Six months of multinational CIMIC experience.

3. Qualifications needed by all Consultants:

- a. Professional/Experience. General staff skills are required.
- b. Flexibility and ability to work in a collaborative group environment.
- c. Security Clearance. None
- d. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge: very comfortable working with a computer and:

- a. Word Processing: Working Knowledge
- b. Spreadsheet: Basic Knowledge
- c. Graphics presentation: Working Knowledge
- d. Database: Basic Knowledge

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e. Internet search: Proficient

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately two times per year for periods of approximately one to two weeks.

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APPENDIX 21 TO ANNEX H

ASSOCIATE KNOWLEDGE MANAGER V

1. Duties: The Associate Knowledge Manager (AKM) is a functional Knowledge Manager (KM) supporting the Operational Experimentation Branch and the AKM is responsible for supporting the development and progression of the Civil Military Fusion Centre (CFC) and Civil Military Overview (CMO). The AKM serves as a consultant and Knowledge Manager (KM) for a major Civil-Military Collaboration (CIMIC) experimentation project. Knowledge Managers are functional specialists and maintain administrative responsibility and accountability for their assigned domain area, and provide linkages between the Civil-military Fusion Centre (CFC) and relevant Subject Matter Experts (SME). KMs are familiar within their domain area as well as with Information and Knowledge Management (IKM) methodologies, but generally are not expected to be SMEs on any specific domain subject. As such, KMs are responsible for gathering, assessing, collating, processing (making information easier to consume), and displaying on the Civil-Military Overview (CMO) web portal all the relevant information regarding their assigned area of responsibility. KMs will be able to maintain any of the sectors in the CMO, but will be assigned specific responsibilities by the Chief KM.

Additionally the AKM will have the following specific duties:

- Serve as an Office Editor responsible for editing weekly newsletter inputs and other publishable materials. As each CFC/CMO KM is tasked with producing a sector-specific document, the Office Editor will edit documents to confirm a “common look and feel” to CMO products.
- Support the efforts to advance the CFC/CMO experiment, including the CMO Experiment Crisis Pages that focus on the seven sectors (Economic Development, Governance & Participation, Humanitarian Assistance, Infrastructure, Justice & Reconciliation, Security and Social Well-being) or four themes (Geopolitical Developments, Security and Conflicts, Humanitarian Assistance and Human Rights and Justice)

Since the CFC/CMO project is part of a Concept Development and Experimentation campaign, KMs must be flexible and understand that duties and responsibilities may change to meet the evolving requirements of the project. They will also be asked to contribute to the development of the concept and tools, in addition to developing the CFCs Standard Operating Procedures (SOP).

2. Qualifications:

1. Bachelors Degree in International Affairs, Political Science, History, Economics/Finance, Sociology, or Anthropology. (Note: Other degrees may be taken into account depending on the strength of their other qualifications) from an accredited college or university, with an understanding of the Sectors listed above.

2. Meet at least one of the following criteria:

- a. Six months of in-the-field experience with a recognized IO/NGO.

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- b. Able to read, write or communicate in any of the main native languages in Afghanistan or Northeast Africa.
- c. Six months experience in how to leverage Information Technology to improve information sharing
- d. Three months experience in the Afghanistan or Northeast Africa area of operations.
- e. Six months of multinational CIMIC experience.

3. Qualifications needed by all Consultants:

- a. Professional/Experience. General staff skills are required.
- b. Flexibility and ability to work in a collaborative group environment.
- c. Security Clearance. None
- d. Language. English second language profile of at least 4343 (Fluent, Very good, Fluent, Very Good)) is Mandatory

4. Standard Automated Data Processing (ADP) Knowledge: very comfortable working with a computer and:

- a. Word Processing: Working Knowledge
- b. Spreadsheet: Working Knowledge
- c. Graphics presentation: Working Knowledge
- d. Database: Basic Knowledge
- e. Internet search: Proficient

5. Travel. Must be capable of overseas travel primarily to NATO nations at a frequency of approximately two times per year for periods of approximately one to two weeks.