



24-R-0010
TEMPORARY SERVICE SUPPORT
FINANCIAL DATA ANALYST AND PROCESS
OPTIMIZATION

REQUEST FOR QUOTATION

JWC-24-R-0010

FOR

**TEMPORARY SERVICE SUPPORT
FINANCIAL DATA ANALYST AND PROCESS OPTIMIZATION**

1. Introduction

The Joint Warfare Centre (JWC) was established on 23 October 2003 at Jåttå, Stavanger, Norway and aligned as a subordinate command of Headquarters Supreme Allied Commander Transformation (HQ SACT), Norfolk, Virginia, United States. JWC is NATO's collective training and exercise facility at the strategic and operational level.

2. Scope of Work

Short-term service support financial data analyst and process optimization to the JWC BUDFIN/ J8 finance transformation activities. The service should include the delivery of these objectives:

- 1) Provide subject-matter-expert advice,
- 2) Manage the development, refinement, and delivery of JWC's J8 roadmap and NATO 2030 budget.

3. Eligibility

This Simplified Acquisition is open to Governmental or Commercial entities that:

- 1) Originate and are chartered/incorporated within NATO member nations.
- 2) Maintain a professionally active facility (office, factory, laboratory, etc.) within NATO-member nations.
- 3) Provide the funding for the aforementioned requirement.
- 4) Have successfully performed at least one (1) contract within the last four (4) years substantially similar in scope and magnitude to the requirement described herein.
- 5) At the time of bidding, bidders must be legally authorised to operate this kind of business in any of the NATO-member nations.
- 6) **Special Requirement – Due to the nature of the work and unless explicitly approved, the Bidding Company must not currently have a contract at JWC (outside of the Budget and Finance Branch) and will not be eligible for other JWC Contracts during the period of performance due to participation in requirement development and their relationship with commercial in confidence information.**

4. Type of Contract

Firm Fixed Price Deliverable Ordering Contract

5. Period of Performance and Magnitude

Period of performance:

Base period: 1 Apr 2025 – 31 Dec 2025. Initial work order may be negotiated once awarded and will be incrementally funded based on availability of funds.

Option 1: 1 Jan 2026 – 31 Dec 2026.

Option 2: 1 Jan 2027 – 31 Dec 2027.

Option 3: 1 Jan 2028 – 31 Dec 2028.

Option 4: 1 Jan 2029 – 31 Dec 2029.

The initial contract has a duration of up to 9 months. Depending on budget availability and the sustainability of the need, it is re-evaluated in October 2025 for option 1 and every October for the following years.

Expected Effort

The effort required is expected for a maximum of 165 works units during the indicated performance base period.

1 Work Unit is equal to 1 work day at JWC.

220 works unit are expected during each optional period.

Normal Work Days:

Onsite, Monday-Friday 0730 to 1530 for routine operation – local Stavanger time.

6. Security Considerations

The Company shall be responsible for the safeguarding of NATO classified Information, material and equipment entrusted to them or generated by them in connection with the performance of the Contract.

Any information regarding this contract cannot be published.

Engagement pre-requisite:

Current, valid and active NATO SECRET Security Clearance or equivalent national level for all personnel provided in direct support of this contract.

7. Experience and Competency

Supplier's Candidate must have:

1. At least 3 years of work experience.
2. Finance experience ideally in Financial Planning & Analysis.
3. Process mapping and documenting skills.
4. Organisational skills (setting up workshops, tracking actions/ tasks).
5. Data analysis, reporting and digital skills (preferably AI and/ or process automation knowledge).

6. Have excellent written and verbal communication skills in technical and professional English. Demonstrated proficiency in English as defined in STANAG 6001 (Standardized Linguistic Profile (SLP) 3333 – Listening, Speaking, Reading, and Writing) or equivalent.
7. An ability to work effectively with Microsoft Office/365 software.
8. A structured approach and good organisational skills.
9. Be flexible and service minded.
10. A high level of discretion and confidentiality – Person will be required to sign a non-disclosure agreement.

8. Confidentiality

- 1) The Company shall keep confidential any information obtained under or in connection with the Contract and shall not divulge the same to any third party without the prior written consent by the JWC.
- 2) The provisions of this Article shall continue in force notwithstanding the completion, expiration, cancellation or termination of this Contract.

9. Tasking and deliverables:

The Company's Candidate will be required to primarily provide the following services:

- 1) Provide JWC with an understanding of J8 in the context of NATO's evolving strategic priorities for 2030;
- 2) Develop a roadmap for implementing J8/BUDFIN initiatives and integrating NATO's J8 activities into JWC's NATO 2030 roadmap;
- 3) Document J8 processes, SOP's, and PoW, monitoring and measuring the effectiveness. Keep the J8 roadmap/ PoW updated, recommend KPI and provide recommendations on potential improvements to JWC's J8 structure and ways of working;
- 4) Provide expert advice and guidance on J8/BUDFIN and develop financial strategies aligned with NATO 2030 and JWC transformation activities, design a J8 digitisation plan;
- 5) Analyse NATO's policies, monitor information and documentation from relevant committees and identify opportunities for integration into JWC's financial planning processes;
- 6) Perform analysis, to improve processes and support decision making, ensuring effective allocation of NATO 2030 (and other resources) and adherence to budgetary constraints;
- 7) Collaborate with department heads, stakeholders, and NATO entities to ensure compliance with financial regulations and optimize NATO 2030/ transformation budget utilization;
- 8) Extract and analyse data to prepare financial reports and presentations for senior leadership and NATO committees, highlighting budget performance and alignment with NATO 2030 goals;
- 9) Develop and implement a transition plan for NATO 2030 budgets to the Mainstream budget;
- 10) Support the Head of B&D and FINCON in cross-functional coordination, organising workshops, documenting activities and managing J8 related tasking;

- 11) Design and implement a J8 knowledge management framework to ensure key knowledge is shared and maintained within the J8 function;
- 12) Lead the J8/ BUDFIN activities and input into the JWC systems analysis project;
- 13) Under the supervision of Head of B&D and/or FINCON Act as PoC for J8 2030 related transformation and liaison partner with ACO and ACT Finance Modernisation PLNs to share best practice and keep abreast of developments across commands;
- 14) Provide support and undertake other J8 related tasks as required by FINCON.

10. Place of Performance

The work will be done on site at JWC, Stavanger. Remote work may be considered to a limited degree once the person performing the work has relevant experience with JWC systems and J8/BUDFIN teams.

11. Pricing

Bids must be submitted with a Work Unit/Daily Rate using the attached Bid Form. The quoted rate must be "all-inclusive" [i.e. including but not limited to any travel required by the Company, per diem/subsistence allowance, accommodation, local transport etc.] based on a Monday-Friday schedule, with approximately 16-22 WUs per month needed.

Formula for the evaluation for award is listed on the bid form. Actual order will be agreed by mutual agreement, availability of funds, and ordering using the bid prices. Bid Prices are firm for the Period of Performance.

Please note that JWC will not be able to provide assistance with local transportation or accommodation.

However, the JWC will be able to reimburse the cost of one round trip up to NOK 10,000 on supporting documents.

12. Currency

Bidders may quote in NOK only. Bidders are also advised that all invoices and payments will be made in the currency agreed in the contract. Bank charges related to any payments outside Norway will be charged to the Company.

13. Price Comparison

For the purpose of price comparison, all quoted prices will be in NOK. JWC will make the evaluation of bids solely on the basis of the requirements specified herein. Bids will be evaluated upon the technical acceptability of each submitted Qualifications Candidate Matrix (Annex A) and the price proposals. The anticipated Deliverable contract shall be awarded to the bidder(s) submitting the ***Lowest Price Technically Compliant*** offer.

JWC is not responsible for seeking any information that is not easily identified and available in the proposal package.

14. Partial Bidding

Partial Bidding is NOT AUTHORIZED.

15. Bid Closing Date

Bids must be received at JWC **not later than 12:00 hours (local time Norway), 21 FEB 2025**. At that time and date, bidding will be closed.

16. Bid Submittal

As this procurement is executed under Simplified Acquisition procedures, you are kindly requested to submit the completed forms to the following email address:

Email Address: pcs@jwc.nato.int

In the subject field of the e-mail, please use the following reference:

BID PROPOSAL JWC-24-R-0010

17. Communications and Contacts for Clarification

1. Communications in General

Any communications related to this RFQ, between a prospective bidder and JWC shall only be through the JWC Contracting Officer and/or JWC Contracting Specialist; only such persons may, during the solicitation and evaluation period, answer inquiries regarding this RFQ. There shall be no contact with regards to this RFQ with other JWC or NATO personnel. This is to maintain all bidders on an equal and competitive footing. Bidders not following this rule will be disqualified.

2. Bidders Request for Clarification

Bidders should seek clarification as soon as possible. Any explanation desired by a bidder regarding the meaning or interpretation of this RFQ, specifications etc., must be requested in writing (letter or email) to the Contracting Officer. The Contracting Officer must receive clarification requests at least the day before bid closing. It is the Contracting Officer's exclusive right to deny or grant an extension of the closing date.

Information given to a bidder will be furnished to all prospective bidders, by way of a clarification to the RFQ. Oral explanations or instructions will not be binding unless confirmed in writing by the Contracting Officer.

3. Clarification of Proposals and Discussions

During the proposal evaluation process, JWC reserves the right to discuss any proposal with the bidders in order to clarify what is being offered (technical capabilities, financial information, investment plan, etc.) and to resolve any potential areas of non-compliance. However, no change to the content of the proposal (technical, financial, etc.) shall be permitted.

Additionally, due to the highly technical nature of these requirements, JWC reserves the right to conduct pre-award discussions with any proposed Candidates to accurately assess identified technical competencies. Discussions will be limited to scope of this IFIB and the evaluation criteria identified.

4. Clarification question deadline

14 FEB 2025 not later than 12:00 hours (local time Norway).

5. Point of Contact

Mr Kjetil Sand, Contracting Officer
Tel: +47 52 87 92 90
E-mail address: kjetil.sand@jwc.nato.int

CRP Timothee Maillefer, Staff Officer
Email address: timothee.maillefer@jwc.nato.int

All correspondence is also to be forwarded to group email box:
pcs@jwc.nato.int

Joint Warfare Centre
BUDFIN – Purchasing and Contracting Branch
ATTN: Kjetil Sand
P.O. Box 8080
Gamle Eikesetveien 29
N-4068 Stavanger
Norway

18. NATO General Terms and Conditions

The JWC General Terms and Conditions are applicable to this procurement and can be located on the JWC website at <https://www.jwc.nato.int/organization/contacting> under Contracting Clauses

Additionally, NATO contracts do fall under the terms and conditions outlined in the 2008 Supplementary Agreement between the Kingdom of Norway and the Headquarters Supreme Allied Commander Transformation and Supreme Headquarters Allied Powers Europe. Of which in Article 3-8, c. states:

“The relevant Norwegian authorities will, upon official announcement by the HQ, accept and facilitate, in accordance with the principles above, that contractors as defined in Article 1-1, q, may enter and reside in Norway during the period they are contracted by the HQ. The relevant Norwegian authorities will accept the contract as documentation for work permits. This will only apply to non-Norwegian citizens.”

Annex A – Qualifications Matrix in accordance with paragraphs 6 and 7

Security	Company Response
Valid and active NATO SECRET Security Clearance	
Required Experience and Competency	Company Response on how candidate meets the criteria.
1. At least 2 years of office experience.	
2. Finance experience ideally in Financial Planning & Analysis.	
3. Process mapping and documenting skills.	
4. Organisational skills (setting up workshops, tracking actions/ tasks).	
5. Data analysis, reporting and digital skills (preferably AI and/ or process automation knowledge).	
6. Have excellent written and verbal communication skills in technical and professional English. Demonstrated proficiency in English as defined in STANAG 6001 (Standardized Linguistic Profile (SLP) 3333 – Listening, Speaking, Reading, and Writing) or equivalent.	
7. An ability to work effectively with Microsoft Office software.	
8. A structured approach and good organisational skills	
Other	Company Response
Any other comments relevant to the submitted bid and not covered above. Could be resume(s) for personnel intended for a potential contract.	

Date: _____

Signature: _____

Name & Title: _____

Company: _____

Bid Reference: JWC-24-R-0010

Annex B

BID FORM
Firm Fixed Price Proposal

Item	Description	Unit/Daily Rate
1.	Onsite work unit (daily rate for base period) x Quantity 1	
2.	Onsite Work Unit (daily rate for option 1) x Quantity 1	
3.	Onsite Work Unit (daily rate for option 2) x Quantity 1	
4.	Onsite Work Unit (daily rate for option 3) x Quantity 1	
5.	Onsite Work Unit (daily rate for option 4) x Quantity 1	

Total Cost for Evaluation for purpose of award will be:

Evaluated Cost = (165 Onsite Work Units base period) + (220 Onsite Work Units – option 1) + (220 Onsite Work Units – option 2) + (220 Onsite Work Units – option 3) + (220 Onsite Work Units – option 4)

Bidder Comments:

Date: _____ Company: _____

Name & Title: _____ Signature: _____

Bid Reference: JWC-24-R-0010