

OFFICIAL

Integrated Warfare Centre (IWC) Lessons Contract

Statement of Requirement

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Contents Page	Pages
Acronyms.	3
Statement of Requirement.	4-15
Annex A. IWC Contractor Terms of Reference.	
Annex B. PJHQ Contractor Terms of Reference.	
Annex C. MSHQ Contractor Terms of Reference	
Annex D. DEWH Contractor Terms of Reference.	
Annex E. jHUB Contractor Terms of Reference.	
Annex F. Contracted Lessons Support Structure and Relationships.	
Annex G. Project Key User Requirements.	
Annex H Contractor Mandatory Training Requirements	
Annex I- Authority T&S Policy.	
Annex J – Project Manager Terms of Reference.	

Acronyms

A&A	Analysis and Assurance
AH	Assistant Head
DEWH	Defence Experimentation and Wargaming Hub
DFD	Defence Force Development
DLIMS	Defence Lessons Identified Management System
IWC	Integrated Warfare Centre
KSE	Knowledge, Skills and Experience
KUR	Key User Requirement
MOE	Measure of Effect
MSHQ	Military Strategic Headquarters
PJHQ	Permanent Joint Headquarters
RODs	Record of Decisions
SOPs	Standard Operating Procedures
SMEs	Subject Matter Experts
TAF	Tasking Approval Form
TOR	Terms of Reference
TTPs	Tactics, Techniques and Procedures
TUPE	Transfer of Undertakings (Protection of Employment)
UKStratCom	UK Strategic Command
VDS	Virtual Desktop Services
WARDEV	Warfare Development

Note on terminology. Throughout this document 'Contractor' refers to the Contractor of the requirement. 'Lessons Contractors' refers to the 8 contracted employees and the Project Manager provided by the Contractor/Contractor to conduct the work.

Introduction

1. Defence requires the Integrated Warfare Centre (IWC) to provide a well-resourced and effectively executed lessons capability to ensure the development of the Joint Force into an adaptable and innovative force. To provide the lessons capability, IWC requires external assistance to provide skills and competencies not currently available to the military or Civil Service workforce and essential to deliver an effective lessons process. External assistance is required over 2 years, with an option to extend by a further 1 + 1 years.

Requirement Summary

2. IWC is looking to award a contract to a suitable Contractor to provide professional services support in the form of 8 full time personnel working across the UK STRATCOM footprint, within the following Departments; Integrated Warfare Centre (IWC) Analysis and Assurance (A&A) Team, Military Strategic Headquarters (MSHQ), Permanent Joint Headquarters (PJHQ), jHUB and the Defence Experimentation and Wargaming Hub (DEWH). Lessons Contractors will be responsible for collecting, analysing, actioning, implementing and validating lessons from UK Defence operations and exercises, wargaming events, experimentation, and innovation activities. This will be conducted in accordance with relevant Defence Lessons Policies¹, which will be shared with Lessons Contractors during the mobilisation period, and using tools, primarily the Defence Lessons Identified Management System (DLIMS). DLIMS a Defence-wide tool that acts as a central database for lessons identified from operations, exercises and routine business. The full activity and skills required of Lessons Contractors working within each Department are outlined within the Terms of Reference, at Annex A-E. These skills are not available in the existing Military or Civil Service workforce within the necessary timeframe. The Contractor will also need to provide a Project Manager to oversee the activity outlined at Deliverable 1 (kick-off meeting) and 6 (quarterly performance reviews), and any associated actions that arise from these deliverables. The full activity and skills required of the Project Manager for Lessons Contractors working within each Department are outlined within the Terms of Reference, at Annex J.

3. The resource is required from Contract Award, when the Mobilisation period will begin until Service Go Live 08 October 2025. The initial contract term is 2 years from Contract Award, which will be no later than 10 September 2025 to 9 September 2027. There is an option for the Authority to extend the contract by two further 1 + 1 optional extension years, to a maximum end date of 9 September 2029, depending on Contract Award date.

Background

4. A robust lessons function is vital to Defence's ability to adapt to warfare development, technological advances and shifting adversaries. Since 2018, the Integrated Warfare Centre (IWC) (previously Joint Warfare) has provided consistent and persistent lessons support to the whole Joint Force that has enabled it to learn and innovate at pace. This is part of IWC's responsibility to enable the Joint Force to operate, integrate, innovate, develop, and adapt to become the military component of the Integrated Force of tomorrow in response to the changing character of conflict. The IWC lessons function thus contributes to UK Defence's ability to minimise vulnerability through optimising and adapting capability and improving coherence across Defence.

5. Since 2018, the effective delivery of lessons support has been achieved through the contract of external Subject Matter Experts (SMEs) who are able to work full-time in dedicated support of the lessons process. In addition to continuous lessons management,

¹ [JSP 441 Version 4.3-FINAL-U\[1\].pdf](#)

external lessons support has enabled urgent analysis that has provided immediate benefit to Defence. Short-term project teams of Lessons Analysts have also produced papers in other areas deemed strategically significant to UK Defence and requiring timely, skilled analysis.

6. The current arrangement provides Defence with a total of 8 Lessons Contractors that are distributed across 5 Defence Departments to enable lessons processes across the Joint Force. IWC must retain this support to the Joint Force without any loss of continuity.

7. It is the intention that by the end of this contract term, including any option years that are invoked, this capability will be transferred to either Military or Civil Service staff and as such, Lessons Contractors will be expected to contribute to the upskilling of these staff, as required.

Prerequisites

8. The Contractor is required to select suitably skilled, qualified and experienced individuals for the roles outlined, in accordance with the Terms of Reference at Annexes A-E and J.

The Requirement

9. Lessons Contractors are required to deliver the lessons capture, analysis and exploitation requirements in support of the below Director IWC (DIWC) objectives. Note that the below are IWC level Objectives that are included here for context only, to illustrate how the work would contribute to broader objectives, held by IWC. As such, Lessons Contractors will not be solely responsible for meeting these objectives but will be part of a wider IWC that collectively do so. Lessons Contractor Terms of Reference at Annex A-E, J and Key User Requirements at Annex G provide detail as to what is expected in terms of outputs from Contractors within each of the 5 areas of work.

a. IWC Objective 3.1 Enhance the Defence Lessons process, including the exploitation of lessons, by cohering pan-Defence lessons activity.

- i. Establish and maintain a regular battle rhythm of cross-Defence discussion and collaborative working to identify and discuss observations, insights and lessons to inform the Warfare Development (WARDEV) community of interest.
- ii. Expand the reach of our knowledge sharing and activities beyond UK Strategic Command (STRATCOM) to WARDEV community of interest and international partners.
- iii. Establish and maintain mechanisms to allow Defence users to exploit validated lessons to support cap integration/WARDEV, doctrine refinement and revision of Tactics, Techniques and Procedures (TTPs) through an auditable trail and at the speed of relevance.
- iv. Establish and maintain a bespoke Lessons contractor support contract framework.
- v. **Measure of Success.** Validated force development supported by a functioning network of stakeholders exploiting the lessons pathway from capture to incorporation within the Joint Force.

b. IWC Objective 5.1.3 b. Lead the improvement and development of wargaming research within defence.

- i. **Measure of Success.** MOD and x-HMG access to wargaming capability and capacity has been enhanced.

c. IWC Objective 7.1 Conduct proactive lessons and insights analysis to inform Defence Force Development (DFD) at the joint operational level. Critical.

- i. Enhance IWC's ability to proactively identify insights in support of Joint Force's (JF) ability to campaign.

- ii. **Measure of Success.** Validated force development supported by a functioning network of stakeholders exploiting the lessons pathway from capture to incorporation within the JF.

d. IWC Objective 8.1 Develop evidenced solutions to the prioritised problems and opportunities for the current force across the joint functions based on quarterly prioritisation.

- i. **Measure of Success.** The Integrated, Joint, Force has an increasing operational advantage across the Joint Functions.

e. IWC Objective 13.2 UKStratCom and wider Defence is able to draw strategic benefits from the jHub portfolio.

- i. jHub portfolio reflects Command priorities and understanding of value in addressing specific operational / capability problems.

- ii. jHub is able to clearly articulate and showcase the value of its portfolio through development of benefits management criteria.

- iii. **Measure of Success.** jHub is able to ensure innovation funding is spent efficiently.

f. IWC Objective 14.1 UKStratCom and wider Defence considers jHub to be a valuable and effective partner and a key enabler to identifying and accelerating new and novel solutions to enhance Defence's competitive advantage.

- i. jHub invests provides support to other stakeholder's innovation initiatives.

- ii. jHub is integrated into UKStratCom strategy development and capability planning and development.

- iii. jHub holds innovation events that are themed around priority topics.

- iv. **Measure of Success.** UKStratCom stakeholders integrate jHub advice and information into their decision-making processes, based on a sound understanding of its value and role.

10. These objectives are reviewed by IWC on a quarterly basis but are unlikely to change to an extent that effects the Lessons Contractor roles and outputs within the contract term, as the underpinning factor is support to operations and related training, which is enduring. If objectives do change so far as to require a change in the objectives and key responsibilities and outputs of the Lessons Contractors, this will be reviewed by the Authority and facilitated through the contractual change control process.

11. The products of work related to achieving these objectives will generally be in the form of analytical reports and papers that inform decision making in support of operations, training and the continuous improvement to the lessons process overall. Some of the work conducted by Lessons Contractors will include networking and defence engagement, so that UK Defence are working collaboratively with international partners and in line with NATO policy. In the past, this has included visits to NATO partner nations to deliver presentations on UK Defence Lessons policy and process or attending such from other nations. Lessons Contractors will also be required to contribute to networking within UK Defence, to share best practice and maintain a healthy organisational learning culture.

12. Under the overarching guidance of these IWC objectives, Lessons Contractors will be directed to work by line managers within each area, with oversight by AH A&A (Assistant Head, Analysis and Assurance) to ensure it is supportive of, and coherent with, Defence-wide lessons activity and force development efforts. A more detailed outline of the Contracted Lessons support structure and relationships can be found at Annex F.

13. The Contractor will be required to assign a Project Manager to liaise with the Authority's Project Team, Line Managers and Lessons Contractors themselves to oversee Contractor performance and manage any issues that arise relating to such. Deliverable 9 and 10 (para 14) and Annex J (TOR) outline further detail regarding the role of this Project Manager and the Contractor should determine how many days per annum the Project Manager would be required to fulfil this requirement

Deliverables

14. In support of the requirements delivered by the Lessons Contractors at Annexes A-G and J, the Contractor shall be expected to provide the following deliverables throughout the duration of the contract:

D1: Kick Off Meeting. The Contractor must provide appropriate representation to attend a kick off meeting, which shall be arranged by the Authority to occur within 5 working days of the Contract Award date. This meeting will be held in person, where logistically possible, with MS Teams as an alternative option at the Authority's discretion. The kick off meeting will be looking to discuss the detail of the mobilisation period, and any other relevant discussions required for a smooth transition to the new contract. A full agenda shall be drawn by the Authority and issued to the Contractor with the signed contract. Minutes will be recorded and circulated by an IWC representative within 5 working days of the meeting. Upon completion of the kick-off meeting, the Authority shall confirm its acceptance within 10 working days or if applicable request the Contractor makes relevant changes as identified.

D2: Mobilisation Activities. The Contractor is required to complete all necessary mobilisation activities within the mobilisation period, as directed by the Authority. Upon completion of the required activities, the Authority shall confirm acceptance within 10

working days or if applicable request the Contractor makes relevant changes as identified. Specific mobilisation activities shall include the following:

- a. **Induction Training.** The completion of induction training (provided by the Authority Line Manager) by all Contractors within 20 working days of Contract Award. The Authority will confirm acceptance of this deliverable once all Lessons Contractors have confirmed with their line manager that training is complete and, where applicable, certificates are provided to the appropriate individual within their respective Department. This should include:
 - (1) Site specific security and health and safety training, including the collection of site passes and mandatory site briefs. Where site specific training is not available to attend within 10 working days, the next available training must be booked by the Lessons Contractors.
 - (2) DLIMS training, as directed by the Authority. Training materials will be provided by the Authority.
 - (3) Any other such mandatory training and induction activities that the Authority requires Contractors to complete, according to their place of work and in line with Annex J.
- b. **IT Set up.** Account set up, transfer of MODNET laptops, system permissions.
- c. **Reporting.** The Project Manager is required to deliver a weekly status report to AH A&A, outlining the mobilisation activities that have been undertaken by all Lessons Contractors and any outstanding activity.

D3: Business as Usual. Lessons Contractors are expected to deliver the BAU deliverables as outlined in their respective TORs and in line with the deadlines issued to them by their respective line managers and/or Assistant Head (AH A&A). Acceptance of this deliverable will be confirmed when BAU work is completed and submitted to respective line managers, in accordance with such specified timelines.

D4: Contractor update meeting (weekly - Monday PM). All lessons Contractors shall attend a weekly project update to cross-brief lessons priorities, share good practice and allocate staff effort as required. This meeting will be hosted virtually on MS Teams and co-ordinated by the IWC lessons Contractor, who will provide informal feedback to the Assistant Head (AH) Analysis & Assurance Branch (A&A) upon the conclusion of each meeting. The IWC Lessons Contractor shall produce and circulate meeting Record of Decisions (RODs), within 2 working days, at which time the Authority shall confirm acceptance of this deliverable or, if applicable, request the Contractor makes relevant updates as identified.

D5: A&A Co-Ord Meeting (monthly). A Lessons Contractor from within each area will attend a monthly coordination meeting, set up by the A&A team and attended by a representative of the IWC A&A team in order to update A&A on completed, ongoing and planned activity, cross-pollinate work strands and projects for enhanced output and, if necessary, seek A&A direction and guidance. This shall be a virtually held meeting, via MS Teams. Lessons Contractors will be required to deliver verbal briefs to AH A&A providing status updates on their respective work strands, after which the Authority will confirm acceptance of this deliverable, or if applicable request the Contractor makes relevant updates as identified. The A&A team shall produce and circulate meeting RODs within 5 working days of the meeting.

D6: Line Management Review (quarterly). AH A&A (or a nominated member of the Authority) will engage with the line management within each area (IWC, PJHQ, MSHQ, DEWH and jHUB) to review priorities and review the performance of individual lessons Contractors. The Contractor's Project Manager should also attend this meeting. Where a Lessons Contractor is assessed by the Authority as "not performing" in accordance with their respective TOR, the Contractor is responsible for raising a performance plan which should be implemented, and progress reviewed at the next quarterly review. The A&A team representative shall produce and circulate RODS within 10 working days of the review. The Authority shall either confirm acceptance of the performance improvements within 20 working days or, where performance does not improve by the following quarterly review, the Authority shall request that the Contractor sources a replacement Lessons Contractor. Where a replacement Lessons Contractor is required by the Authority due to a foreseeable event, i.e. resignation, the Authority should be informed at the earliest opportunity and a new Contractor sourced within a notice period of 3 months. Where a replacement Lessons Contractor is required by the Authority due to urgent and unforeseeable issues, they are to be sourced and ready to deliver as soon as possible after the initial notification of Lessons Contractor absence or removal. In line with KPI 5 (Schedule 9), financial deductions will be applied for the number of working days lost due to a replacement not being provided within this time frame.

D7: Social Value Mission Update (quarterly). The Contractor is to provide a summary of how they are delivering the Social Value mission² on a quarterly basis by delivering a report to the Authority detailing any measures taken to achieve the mission during that period. The Authority will confirm acceptance upon receipt of such report, or if applicable, request the Contractor makes relevant updates as identified.

D8: Command Board (quarterly). The IWC Command Board measures performance against IWC Management Plan objectives, assesses and manages risks and directs activity for the following quarter. As Lessons Contractors work to objectives set within the IWC Management Plan, their work will be subject to Director IWC review within this quarterly forum, which shall be arranged by the Authority. The Authority (IWC Chief of Staff) shall produce and circulate RODS within 10 working days of the Command Board. Lessons Contractors are to deliver any actions that are issued to them during this forum, in accordance with the deadline set within the RODS, upon which the Authority will confirm acceptance or if applicable, request the Contractor makes relevant updates as identified.

D9: Knowledge Transfer. There are two separate elements of knowledge transfer activity that will be required by the Contractor:

- a. Throughout the contract term, Lessons Contractors will be responsible for the production and development of a Lessons Management Information System user guide, which should be produced and delivered to AH A&A 3 months prior to the contract end date; whether this will be the end of the two year term or the end of Option Years one or two (should they be invoked). This User Guide will instruct DLIMS users as to the most effective use of the system. Further information on the detailed requirements for this user guide will be discussed with the Contractor and agreed by the Authority during discussions leading up to the delivery of the Exit Management Plan. The Contractor shall deliver a written report to the Authority at quarterly review meetings, outlining measures taken within that period to achieve this activity. Acceptance will be confirmed within 10 working days after the Authority receives these reports, after the Authority has reviewed and either approved or

² Mission: Kick start economic growth. To secure the highest sustained growth in the G7 - with good jobs and productivity growth in every part of the country making everyone, not just a few, better off. (Reference paragraph 37 and [2025-02-11 PPN 002 The social value model \(2\).docx](#))

rejected with further direction and guidance to be issued to the Contractor containing timeline for required completion.

b. During the entirety of the final 3 months of the contract term, whether this is final three months of the two year contract or the final three months of the Option years one (1) or two (2), should they be invoked, Lessons Contractors will be responsible for leading knowledge transfer training activities that develop the SQEP of identified and nominated Service Personnel (SP) or Civil Service (CS) staff with primary role responsibility for lessons management within functional area. This activity will be discussed in the lead up to the delivery of the exit management plan, including the method, format and frequency of delivery (D10). Acceptance will be confirmed once AH A&A has received confirmation from each Department line manager that the Knowledge Transfer activity has been delivered and as a result of this activity, SP or CS staff have had sufficient handovers to allow them to perform the roles independently.

D10: Exit Management Plan. The Contractor is required to submit an Exit Management Plan to the Authority within 3 months of Contract Award. Acceptance will be confirmed once the Exit Management Plan is delivered to and agreed by the Authority. The Exit Management Plan should set out the Contractor's proposed methodology for achieving an orderly transition of the Services from the Contractor to the Authority and/or its replacement Contractor on the expiry or termination of this contract. It should comply with the Requirements set out at para 27 of this SOR and will be reviewed and either approved by the Authority or further direction and changes communicated to the Contractor.

Milestones

15. Contract milestone dates are:

MILESTONE	OUTPUT DESCRIPTION	ACCEPTANCE CRITERIA	OCCURANCE
Mobilisation activities	The Contractor shall deliver the mobilisation activities in accordance with D2.	Upon successful delivery of the mobilisation activities outlined within deliverable 2, the Authority shall confirm acceptance of this milestone.	Once, commencing from Contract Award until Contract go live on 08/10/25
A&A Co-Ord Meeting	The Contractor shall assign a Lessons Contractor from within each area to attend a monthly coordination meeting, in accordance with D5.	Upon successful delivery, the Authority shall confirm acceptance of this milestone on a monthly basis.	Monthly, on a date specified by the Authority.
Quarterly line manager review and progress meeting.	The Contractor shall attend and contribute to quarterly progress meetings with AH A&A and the respective line managers. In accordance with D6.	Upon successful delivery, the Authority shall confirm acceptance of this milestone in the quarterly review meeting.	Quarterly, on a date specified by the Authority.
Exit Management Plan.	The Contractor shall deliver an exit management plan in accordance with D10.	Upon successful delivery of the plan, the Authority shall confirm acceptance of this milestone within	Once, 3 months after contract award date.

		10 working days of receipt.	
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Working Routine and Locations

16. Lessons Contractors will work from a variety of locations, on a full-time basis, Monday to Friday (0830-1700hrs with a one-hour lunch break), excluding bank holidays and with agreed individual leave allowance periods of up to 25 days per annum:

- a. 1 x Lessons Contractor in JHub, located at Central Scale Space, White City, 58 Wood Lane, London, W12 7RZ.
- b. 1 x Lessons Contractor in IWC analysis team and 3 x contractors in PJHQ working in Bldg 410 at Northwood HQ, Sandy Lane, Northwood, HA6 3HP.
- c. 2 x Lessons Contractors in Military Strategic Headquarters (MSHQ), MOD Main Building, Whitehall, London, SW1A 2HB,
- d. 1 x Lessons Contractor in the Defence Experimentation and Wargaming Hub, at MOD Southwick Park, Fareham, PO17 6HE.
- e. Other locations, as required by the Authority and in consultation with the Contractor. These locations are not predetermined and would arise due to demand for lessons capability at a certain location for a limited duration. For example, engagement with a NATO partner nation to share lessons KSE at a conference/other such event. Where travel is required by the Authority outside of the usual working locations at para 16 of this Statement of Requirements, the Contractor will be required to book travel, meals and accommodation for the Lessons Contractors, outside of Authority travel booking processes but in accordance with the Authority T&S Business Travel Policy detailed at Annex I. Invoices for such expenses to be submitted accordingly after the travel event for Authority scrutiny and approval. Lessons Contractors who are required to work additional hours or travel overseas for work events would receive time off in lieu of notice (TOIL) for the days worked. The Lessons Contractors will maintain a TOIL record, to be agreed as required by the Authority.
- f. Remote working in accordance with IWC Standard Operating Procedures (SOPs). Many Authority sites are currently operating a hybrid way of working, with a mixture of site and working from home, therefore there is the option to work remotely where appropriate and this will be discussed with each area throughout the Contract term.
- g. **Extended hours.** In the event that Lessons Contractors are required to work additional hours, such as a response to a crisis that results in urgent work outside of normal working hours, time off in lieu (TOIL) will be awarded to cover any excess hours worked, to be agreed and approved by the Authority.

17. T&S can be claimed by Lessons Contractors in accordance with the Authority's T&S policy³, which is provided at Annex I, and on approval of the Authority and in the event of attendance required away from normal place of work. Travel to and from the Lessons Contractor's home address and normal place of work will not be funded by the Authority. If

³ Policy Leaflet 16 JSP 800 Vol 5 Part 2 Version 10.9 (Car Travel) and JSP 800 Vol 2 (Version 8.23 Aug 24), Part 2, Para 13 (Air Travel)

the T&S policy changes throughout the duration of the contract, then the Authority will inform the Contractor.

Performance Management

18. a. **Contract Performance Management.** This will be achieved through the mechanisms described at the deliverables section of this SOR and through regular interactions between AH A&A and an allocated Lead Lessons Contractor.
- b. **Contractor Individual Performance Management.** AH A&A may engage with the Lead Lessons Contractor and/or Project Manager at any time to discuss individual Lessons contractor performance. Relevant assessments will also be discussed during weekly updates annotated at the 'deliverables' section of this SOR. IWC will contribute to any Contractor requested performance reporting for individuals.
- c. **KPIs.** The Authority intends to manage the contract and monitor Contractor performance through a series of KPIs, outlined in Schedule 9 to the Contract Terms and Conditions. There is a requirement for KPIs to be reported and published on a quarterly basis in line with the Cabinet Office Transparency Agenda⁴.
- d. **Financial Deductions** are linked to the KPI's (Schedule 9) as the financial remedy for the Authority in the event of the Contractors failure to meet the required Service Level Performance. The remedy for KPI's 1- 4 is a scale of percentage deductions from the monthly contract payment. The remedy for KPI 5 is a Financial Deduction from the monthly contract payment, based on the cost of working days lost due to a replacement Lessons Contractor not being provided.

Government Furnished Assets

19. It is now mandated for contractors, suppliers, and industry partners to use Virtual Desktop Services (VDS) to access MODNET Official up to OFFICIAL SENSITIVE (OS), instead of using a MODNET Official device. Lessons Contractors and the Project Manager will use personal laptops/laptops provided by the Contractor, as appropriate, and will use the Virtual Desktop Services (VDS) system to access material when working from home/remotely. Lessons Contractors must have a non-MODNET Windows 10, Windows 11 or macOS laptop/workbook with internet access. When working from office at their respective locations, desktop access will be provided to MODNET at OS and Secret. A Crown Servant will act as the sponsor and complete the VDS application form as part of the new starter onboarding process during the Mobilisation period. Once Contractors are in post, should there be a requirement to request an exemption for a MODNET laptop, this application will be supported by IWC Admin Support team. The result of this application will depend on the individual circumstances of the Contractor and the security restrictions of the area they work in. This process will be directed by the Authority in accordance with internal policy. A blank GFA schedule is provided at Schedule 13 and should be completed and returned to the Authority within 5 working days, should MODNET laptops need to be issued. The supplier shall manage and report on GFA in accordance with DEFSTAN 05-99 (Managing Government Furnished Equipment in Industry.)

Security

⁴ [Key Performance Indicators \(KPIs\) for government's most important contracts - GOV.UK Guidance: Key Performance Indicators \(HTML\) - GOV.UK](#)

20. All Lessons Contractors will require access to relevant places of work as listed above and will complete site-specific security training requirements, which will be conducted during a working day and provided by the respective site the Contractor is working for. It is desirable for all Contractors to hold Developed Vetting (DV) clearance at Contract Award and essential for DV to be in place by three (3) months following Contract Award and for the remaining entire duration of the contract, including the option years one (1) and two (2). During the three (3) month period following Contract Award, Lessons Contractors must hold SC clearance at a minimum. Provision of this clearance is to be at the expense of the Contractor.

Personal Data

21. IWC will protect all personal data in accordance with appropriate legislation and MOD direction⁵. Further Personal Data information and requirements are detailed within the DEFFORM 47, DEFCON 532B, DEFFORM 532, Annex B Personal Data Aspects Letter and Schedule 16 to the Contract Terms and Conditions.

Quality & Standards

22. The Contractor is required to comply with ISO 9001 2015 or equivalent. Certification is required, with appropriate scope to cover the entirety of the project and issued by a United Kingdom Accreditation Service accredited body (or equivalent). The Contractor shall provide skilled, qualified and experienced professionals (SQEP) to deliver this service.

Health & Safety (H&S)

23. Lessons Contractors will comply with the local H&S requirements for their location, including attending mandated H&S and fire training and site induction briefs. These requirements will vary by location and will be conducted during paid working days.

TUPE

25. These services are currently being delivered under an existing contract until 7 Oct 25 and personnel working full time providing delivery of that Contract may be entitled to TUPE transfer to a new Contractor. There are 8 employees in scope to transfer. Further TUPE information is detailed in the DEFFORM 47 and Schedule 11 to the Contract Terms and Conditions.

Mobilisation

26. Mobilisation of this requirement will commence after Contract Award, which will be no later than 10 September 2025 to end on the date the current arrangement ends, which is 7 Oct 25, to ensure minimal disruption to processes and tasking. Any individuals who are subject to the TUPE transfer will remain in their current role and location. Should there be a change of personnel, new Lessons Contractors may be required to work alongside existing Lessons Contractors to facilitate transfer of services prior to service commencement date where procurement and approvals timelines allow.

Exit

27. As per D10, the Contractor will be required to prepare and submit a detailed Exit Management Plan within 3 months of Contract Award for Authority approval. On receipt of the Exit Management Plan, the Authority will confirm acceptance/rejection within 10 working

⁵ [JSP 441: Data Protection.](#)

days. The criteria for approval is for the plan to address how a smooth, orderly transition of the relevant Services from the Contractor to the Authority/Replacement Contractor is to be achieved from an operational perspective, including details of processes, documentation, data transfer, systems migration, security and segregation of the Authority's technology components from any technology changes in the Services that have occurred since the Exit Plan was last agreed. The Exit Management Plan will be updated at least annually during the term of the contract and following any major change to the service. The Exit Management Plan will be expected to address how the Exit information is obtained and Exit provisions in relation to People, Assets and IPR, in addition to the below considerations:

- a. **Train MOD staff.** How the contractor intends to support the upskill of permanent staff over the contract term, where possible, to allow the contractors to develop internal capability and pass on their knowledge and reduce MOD reliance on External Assistance in this space. The DLIMS database, Joint Knowledge Exchange and A&A permanent staff will be utilised to support this process. The A&A team are also planning the production of a lessons training package to reduce the onus on the knowledge, skills and experience of Lessons Contractors after this contract ends.
- b. **Knowledge Management.** How the Contractor intends to support the A&A team to incorporate knowledge transfer within this requirement and its deliverables to upskill the internal team and retain knowledge through documentation, to further reduce the need to contract with the Contractor again.
- c. **Exploitation of AI and software advances.** How the Contractor intends to support the A&A team who are developing use of AI to make data extraction easier, DLIMS enhancements to make data entry easier and improvements in the IT systems used to gather and process lessons could reduce the number of personnel required for a functioning Joint Force lessons process.
- d. **Dispute resolution.** The Parties shall use reasonable endeavours to agree the contents of the Exit Management Plan. If the Parties are unable to agree the contents of the Exit Plan within 20 Working Days of its submission, then such Dispute shall be resolved in accordance with the Dispute Resolution Procedure.

Software

28. Lessons Contractors will be afforded access to the Defence Lessons Identified Management System (DLIMS)) and training on this system will be provided as part of the Induction detailed at Deliverables, D2 (a) of the SOR. The data within DLIMS, and the software itself, will remain the property of the Authority.

IPR or Other Rights

29. All documents, electronic and physical, produced by Lessons Contractors are and will remain the property of the Authority. The Contractor shall make any materials or guidance documents, such as DLIMS manuals, produced in relation to Defence Lessons work available for MOD use. The Authority shall own IPR on any data that arises as a result of analysis or tests performed under the contract. Materials produced by the Contractor during the contract term will be Crown Copyright and cannot be used outside of the MOD contract without prior permission. Further information regarding IPR is detailed in DEFCON 703 and Note 1 to DEFCON 703 in the contract.

Exploitation Levy

30. Not applicable.

Pricing/Payment

32. Purchase orders will be raised for each area, to monitor spend throughout the contract term. Payments will be made monthly in arrears. Pricing returns should include the below grades/levels:

- a. 1 x Project Manager. To participate in the kick-off meeting, quarterly performance reviews and relevant actions and work required to support this activity as detailed within the SOR. The Contractor should determine how many days per annum the Project Manager would be required to fulfil this requirement.
- b. 2 x Senior Lessons Contractors. Equivalent to military rank OF5 (Colonel, Captain, Group Captain) or CS equivalent (B2). These Lessons Contractors will work in MSHQ within an area of work where there is routine exposure to high-ranking staff and as such, a higher level of individual is required here.
- c. 6 x Lessons Contractors. Equivalent to military rank OF3 (Major, Lieutenant Commander, Squadron Leader) or CS equivalent (C2). To work within IWC, PJHQ, DEWH and jHub.

Further information regarding Pricing is detailed in Appendix 4 to DEFFORM 47 and Schedule 9 to the contract.

33. **Indexation:** The prices stated in Appendix 4 – Pricing (Schedule 9) will be Firm priced for Years 1-2 and Option year 1 of the Contract and subject to no price increases. Contract Option Years 1 and 2 are optional and at the discretion of the Authority to invoke. Any such variation of pricing (VOP) from Contract Option Year 2 (if invoked) price will be uplifted in line with and calculated in accordance with the following formula / index:

HSGG - SPPI INDEX OUTPUT DOMESTIC - M Professional, scientific and technical services.

As HSGG is a service-based index there's no need to include a non-variable element, meaning the use of the formula:

$$V = P \left(\frac{O_i}{O_0} \right) - P$$

Where P is the base price for the invoice, O_i is the average of HSGG for the year up to the invoice date, O_0 is the average of HSGG for the year up to the contract start date and V is the amount of variation being applied to the invoice. HSGG is produced on a quarterly basis and so a year's average is 4 quarters.

Social Value

37. Government Policy now mandates that the Authority must take account of Social Value in the award of Central Government contracts and commercial activities: [2025-02-11 PPN 002 The social value model \(2\).docx](#). The Outcome from PPN 002 Social Value Model considered best related to the subject matter of the contract and reflected in the Social Value KPI and Social Value Evaluation question is: Mission: Kick start economic growth. To secure the highest sustained growth in the G7 - with good jobs and productivity growth in every part of the country making everyone, not just a few, better off.

Cyber Risk

38. Cyber Risk Assessment has been conducted and the result was that the Cyber Risk Profile is High ⁶. The Authority will complete a Cyber Risk Assessment on at least an annual basis (or otherwise required), and the Contractor will complete a SAQ in accordance with the Cyber Risk Profile. The Contractor must have the cyber security controls specified in DEF Stan 05-138 (Cyber Security for Defence Providers), as appropriate to the cyber risk level specified in the contract.

IR35

39. An IR35 Assessment has been conducted and the result indicated that off-payroll working rules do not apply⁷. Internal quarterly reviews will be undertaken to check that the IR35 assessment hasn't changed in line with central guidance and policy. Any changes will be communicated with the Contractor as required.

⁶ Risk Assessment Ref: RAR-250605A01

⁷ [20250304-IWC Lessons Contract IR35 Assessment Result.pdf](#)