

# RFP-ACT-SACT-23-88



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

## **Request for Proposal**

**RFP-ACT-SACT-23-88**

**SFB Future Operating Environment 2024**

**Bidding Instructions**

**AMENDMENT # 1**

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### **CHANGES INCORPORATED - AMENDMENT #1:**

- Extends the bid submission due date from 19 July 2023 to 11 August 2023.
- Extends the question and answers submission due date from 14 July 2023 to 28 July 2023.
- Changes the Period of Performance start date from 24 July 2023 to 21 August 2023 and expiration date from 31 November 2023 to 29 December 2023.
- Adds language to Compliance Matrix in ANNEX B to include “At least one submission of past performance experience within the last seven years”.

### **BIDDING INSTRUCTIONS**

#### **1. General**

This is a Firm Fixed Price deliverables contract in accordance with the HQ SACT General Terms and Conditions; as such, all employer responsibilities for the contractor performing under this contract shall lie with the contractor company. **Contract Award is contingent upon funding availability; Partial bidding is not allowed.**

#### **2. Classification**

This Request for Proposal (RFP) is a NATO UNCLASSIFIED document.

#### **3. Definitions**

- (a) The “Prospective Bidder” shall refer to the entity that has indicated thereon its intention without commitment, to participate in this RFP.
- (b) The term “Bidder” shall refer to the bidding entity that has completed a bid in response to this RFP.
- (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 RFP 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 Headquarters Supreme Allied Commander Transformation.
- (g) The term “ACT” shall refer to Allied Command Transformation.
- (h) The term “NATO” shall refer to the North Atlantic Treaty Organisation.
- (i) The term “days” as used in this RFP shall, unless otherwise stated, be interpreted as meaning calendar days.

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## 4. Eligibility

- (a) This RFP is open to governmental or commercial entities.
- (b) Established in a North Atlantic Treaty Organisation Alliance member nation.
- (c) Working in the required field of study and legally authorised to operate in the country and countries in which this contract is to be performed, at the time at the time of bidding. Please refer to our terms and Conditions paragraph 23 “Authorization to Perform.” Has performed the desired past performance including size, cost and scope, as described in this RFP.
- (d) All proposed key personnel on this requirement must be citizens of a NATO member nation.

## 5. Duration of Contract

- (a) The contract awarded shall be effective upon date of award.
- (b) Period of Performance: On or about ~~24 July 2023~~ — ~~31 November 2023~~;  
**NEW 21 August 2023 - 29 December 2023.**

## 6. Exemption of Taxes

- (a) In accordance with the agreements (Article VIII of the Paris Protocol dated, 28 August 1952) goods and services under this contract are exempt from taxes, duties and similar charges.

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

## 8. Bidder Clarifications

- (a) Prospective Bidders should seek clarification at their earliest convenience. Any explanation regarding the meaning or interpretation of this RFP, 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 (three) calendar days prior to the bid closing date.

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- (b) In lieu of a bidder's conference, HQ SACT invites bidders to submit initial technical and contractual questions not later than ~~14 July 2023~~; **NEW 28 July 2023**.
- (c) Information in response to all inquiries / requests for clarification to a prospective bidder shall be furnished to all prospective bidders at the following link: <http://www.act.nato.int/contracting> as a Question and Answer addendum. All such addendums and any necessary solicitation amendments shall be incorporated into this RFP. Oral interpretations shall not be binding.

### 9. Bid closing date

Bids shall be received at HQ SACT, Purchasing and Contracting Office, no later than ~~19 July 2023~~ **NEW 11 August 2023, 0900 hours, Eastern Daylight Time, Norfolk, Virginia, USA**. No bids shall be accepted after this time and date. **No hard copy proposals will be accepted.**

### 10. Bid Validity

Bids shall remain valid for a period of one hundred and twenty days (120) from the applicable closing date set forth within this RFP. 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.

### 11. Content of Proposal

A table of contents for the entire proposal:

- (a) The bidder's full name, address, Point of Contacts, Telephone, Fax number; Internet site;
- (b) Compliance statement (See Enclosure#1);
- (c) Past performance (See Enclosure#2);
- (d) Provision of technical and price volumes (See Sealed Bid Price Proposal Enclosure #3), (Reference Annex A - Statement of Work and Annex B - Compliance Matrix).

### 12. Proposal Submission

- (a) Proposals shall be submitted electronically in a two separate PDF documents, one containing the **Technical Proposal** and one containing the **Price Proposal**, each e-mailed separately to:

- Technical proposal: [techproposal@act.nato.int](mailto:techproposal@act.nato.int)

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- Price proposal: [priceproposal@act.nato.int](mailto:priceproposal@act.nato.int)

E-mail subjects shall include the solicitation information along with company name (for example: RFP-ACT-SACT-23-88\_Tech\_ABC Inc. / RFP-ACT-SACT-23-88\_Price\_ABC Inc.). **Allow sufficient time in your submission should you encounter e-mail size challenges.**

- (b) **Price proposals shall be in U.S. Dollar currency.** Contractor may request payment post award in alternate currency based on agreed conversion rate.
- (c) Prices shall be on a **Firm Fixed Price Basis** and include any relevant discount schedule.
- (d) No oral bids or oral modifications or telephonic bids shall be considered.
- (e) It is the ultimate responsibility of a prospective bidder prior to submission that all proposal submissions are reviewed to ensure they meet the technical, contractual and administrative specifications and that offers meet the limitations and expressed conditions.

### 13. 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. 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 an e-mail exchange due to server or size restrictions does not constitute a delay by NATO.**

### 14. Bid Withdrawal

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.

### 15. 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 RFP. HQ SACT is not responsible for any content that is not clearly identified in any proposal package.

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(b) Proposals shall be evaluated and awarded to the company that **Lowest Price Technically Compliant**. Technical clarification of essential competencies may be conducted.

(c) Acceptance of HQ SACT General Terms and Conditions.

### 16. Proposal Clarifications

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 concern.

### 17. Award

HQ SACT intends to award a firm fixed price contract to the Offeror whose proposal represent **Lowest Price Technically Compliant** offer to NATO. Partial awards are not authorized.

HQ SACT will collect information from references provided by the Offeror in regard to its past performance. Contractors must provide authorization to contact references. HQ SACT reserves the right to negotiate minor deviations to the listed General Terms and Conditions to this RFP.

### 18. Communications

All communication related to this RFP, between a prospective bidder and HQ SACT shall 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 RFP. Such adherence shall ensure Fair and Open Competition with equal consideration and competitive footing leverage to all interested parties.

### 19. Points of Contact:

Tonya Bonilla, ACT Contracting Officer,  
757-747-3575, [tonya.bonilla@act.nato.int](mailto:tonya.bonilla@act.nato.int)

Catherine Giglio, ACT Contracting Officer,  
757-747-3856, [Catherine.giglio@act.nato.int](mailto:Catherine.giglio@act.nato.int)

Comeka Stephen, ACT Contracting Specialist Support  
757-747-3575, [Comeka.Stephen@act.nato.int](mailto:Comeka.Stephen@act.nato.int)

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**Enclosure 1**

**COMPLIANCE STATEMENT TO SEALED BID RFP-ACT-SACT-23-88**

It is hereby stated that our company has read and understands all documentation issued as part of RFP-ACT-SACT-23-88. Our company proposal submitted in response to the referenced solicitation is fully compliant with the provisions of RFP-ACT-SACT-23-88 and the intended contract with the following exception(s); such exemptions are considered non substantial to the HQ SACT solicitation provisions issued.

<u>Clause</u>	<u>Description of Minor Deviation.</u>
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(If applicable, add another page)

Company: \_\_\_\_\_ Signature: \_\_\_\_\_

Name & Title: \_\_\_\_\_ Date: \_\_\_\_\_

Company Bid Reference: \_\_\_\_\_

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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 2

#### **PAST PERFORMANCE INFORMATION FORM**

- (a) Contracting Entity:
- (b) Contract No:
- (c) Type of Contract (Firm Fixed Price, IDIQ, Requirements):
- (d) Title of Contract:
- (e) Description of Work Performance and Relevance to Current Acquisition (Type of facility, capacity, estimated patronage, summary of staff used):
- (f) Contract Dollar Amount:
- (g) Period of Performance:
- (h) Name, Address, Fax and Telephone No. of Reference:
- (i) Indicate Whether Reference Acted as Prime or Sub-contractor:
- (j) Comments regarding compliance with contract terms and conditions:
- (k) Complete Contact Information for client:
- (l) Permission to contact client for reference: Yes/No
- (m) Name/Signature of Authorized Company Official

This Enclosure is designed to assist the respective company provide HQ SACT with all necessary documents/information required. For clarification, please refer to Bidding instructions in part 1 of subject solicitation.

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### Enclosure 3

#### **SEALED BID PRICE PROPOSAL**

#### **SUBJECT: RFP-ACT-SACT-23-88**

The categories below are “representative” of skills required to provide deliverables at each level and proposed rates will be used to support the Basis of estimate.

**Proposed rates must be fully “loaded” [G&A, O/H etc.]; however they must not include per diem (meals & lodging) and travel. Travel (and related expenses) will not be covered under this contract, but handled separately in accordance with the ACT Financial Manual.**

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 RFP ACT-SACT-23-88 and the “**Insert : Company Name** Technical proposal”, submitted in accordance with solicitation provisions.

#### **Deliverable Pricing Chart**

<b>Deliverables</b> (Refer to Annex A for further scope of each deliverable)	<b>COST (USD)</b>
<b>Analytical report: characteristics of FOE</b>  <u>Deliverables:</u> <ul style="list-style-type: none"><li>• Draft: 31 October 2023</li><li>• Due Date: 31 November 2023</li></ul>	\$
<b>Impact analysis report: Implications for the transformation of the Alliance's MIOp</b>  <u>Deliverables:</u> <ul style="list-style-type: none"><li>• Draft: 31 November 2023</li><li>• Due Date: 31 December 2023</li></ul>	\$

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

Authorizing Company Official:

Printed Name: \_\_\_\_\_

Position: \_\_\_\_\_

Title: \_\_\_\_\_

Authorizing Company (Signature): \_\_\_\_\_,

Date: \_\_\_\_\_

***Company name*** Witness Official:

Printed Name: \_\_\_\_\_

Position: \_\_\_\_\_

Title: \_\_\_\_\_

Witness Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Annex A**

**Headquarters Supreme Allied Commander Transformation**

**STATEMENT OF WORK**

**FOR**

**SF BRANCH FUTURE OPERATING ENVIRONMENT 2024**

**1. Introduction**

Supreme Allied Commander Transformation (SACT) is responsible to the Military Committee for the transformation and development of the Alliance. SACT provides the evidence to enable strategic policy and concepts development and plays an essential role in Allied joint doctrine development. As a core element of its efforts, SACT continues to innovate, adapt and develop its forces, capabilities, concepts and plans into the future, driven by the NATO Warfighting Capstone Concept (NWCC). The NWCC guides member states and SACT by setting the vision 20 years in the future. The NWCC support Allies' efforts to develop Allied military forces, identify potential capability gaps and provide the necessary recommendations to ensure NATO is ready and able to meet the requirements of the future.

In this context, the new Strategic Foresight Analysis, as the foundation of the FOE, anticipates the evolution of the Future Security Environment (FSE) in the next twenty years and beyond and identifies relevant implications for the Alliance, including the long-term transformation of Instruments of Power (Diplomatic, Information, Military, Environment and non-state actors).

Thus, the main deliverable for Strategic Foresight is the production of the Future Operating Environment in 2024, to address the characteristics of future warfare and its complex environment. This will assist commanders to shape their force development to enhance future fitness.

**2. Background**

The Future Operating Environment (FOE) study will build on the SFA23` baseline to directly assess the selective pressures imposed by the future security environment and the impact of the trends identified on the characteristics of the FOE. The final release of FOE is foreseen by Q2/2024.

The task of envisioning the next two decades presents a significant challenge. However, this work, similar to FFAO18<sup>1</sup>, does not aim to predict the future. Instead, it seeks to outline the plausible characteristics of future operating environment through rigorous trend analysis. It is likely that the future will be defined by an intensified rate and impact of existing global trends, such as climate breakdown, urbanization and resource scarcity. Furthermore, we can anticipate a growing complexity, ambiguity, and a wide range of potential threats. Certain technological fields are expected to undergo particularly dramatic changes, potentially hastening the arrival of the future in those areas. We must also acknowledge the potential for unforeseen and disruptive events, often referred to as "shocks." While the likelihood of such events is low, it is essential for NATO to consider them due to their

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<sup>1</sup> Future for future Alliance operations 2018 report.

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potential high impact. This implies that we should prioritize flexibility, adaptability, and national resilience.

### 3. Scope of Work

The FOE project will analyse the evolving characteristics of warfighting; including audience, battlespace and warfare, in the next 20 years, identifying which are enduring and which are emerging. The FOE will analyse what implications the future operational environment will have on NATO's transformation and development process.

### 4. Deliverables

The Contractor shall produce the following deliverables:

**A. Deliverable 1 Report:** Detailed report assessing the evolving characteristics of the future operating environment, focusing on three elements: audience, battlespace and warfare. In more detail:

a. **Characteristics of the evolving audiences.**

The report should delve into the changing nature of audiences within the future operating environment. It should examine the roles, motivations, behaviours, and dynamics of key actors and stakeholders. The report should offer insights into the diverse and complex nature of audiences and their impact on military operations.

b. **Characteristics of the evolving battlespace.**

The report should analyse the physical, virtual, cognitive and normative effect dimensions that will shape future military operations. By examining emerging technologies, geopolitical developments, environmental factors, and other relevant trends, the report should provide a detailed understanding of the challenges, opportunities, and vulnerabilities present within the future battlespace.

c. **Characteristics of the evolving warfare.**

The report should focus on the changing nature of warfare within the future operating environment. It should analyse emerging concepts, strategies, tactics, and doctrines that will influence future military engagements. By considering the impact of technological advancements, asymmetric threats, hybrid warfare approaches, and other relevant factors, the report should shed light on the evolving dynamics, capabilities, and challenges of future warfare.

**B. Deliverable 2. Impact analysis:**

- a. The deliverable should consist of an overall impact analysis that assesses how the changing characteristics of the future operating environment will affect NATO's transformation and development process. The impact analysis should identify opportunities and challenges that may be relevant to the transformation of the Alliance's MIOp.

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### 5. Place of Performance

- A. Place of Performance will be the Contractor's facility. Necessary engagement may be done remotely.
- B. Travel is not required for this Statement of Work (SoW); coordination can be conducted completely remotely.

### 6. Contract Administration

- A. The COTR shall provide directions, guidance and support information requests, as required, for all process and content areas of the SOW.
- B. The COTR shall resolve outstanding disputes, problems, deficiencies and questions on the technical or process aspects of FOE; review and approve all contractor duties for completeness and accuracy; and review the contractor's work.
- C. The COTR's written approval of work performed is mandatory for the contractor invoice to be successfully processed.
- D. The COTR will receive a letter of appointment form the Contracting Officer that describes the detail of his roles and responsibilities to which he shall formally accept.
- E. The Contracting Officer has final authority (in consultation with the COTR) to determine if the contract/SOW should be amended, extended, modified or cancelled for evolving requirements, new tasks and/or technical non-performance issues.

### 7. Tasks

The contractor shall research and develop the reports indicated in paragraph 4. The product can be delivered electronically.

- A. **Conduct Research.** The contractor shall conduct research on various aspects related to the future operating environment, future warfare, battlespace, and forces design. This research will include original source documents but also encompass materials at the discretion of the contractor in order for them to establish a baseline analytical report. Based on the outcomes of the SFA23, NATO strategic documents and the collected data, the contractor shall assess and evaluate the anticipated characteristics of the future operating environment, examine the dynamics of the future battlespace and provide an impact analysis on the elements of the . The contractor must have a technical, analytical and strategic foundation with an in-depth understanding of NATO doctrine, military operations and strategies and strategic foresight and analysis.
- B. **Report Development.** The contractor will generate two reports (complete with executive summary, research analysis and conclusion) outlining the evolving characteristics that are likely to shape the future operating environment in terms of audiences, battlespace and warfare and their impact on the transformation of the Alliance's MIOp. This will be discussed with the FOE project team.
- C. **Narrative.** The narrative, including the two reports will be between 15000 – 20000 words in total and encapsulate themes aligned with the requirements the FOE project. The contractor

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must have a background of proven previous performance in conducting strategic military analysis.

### 8. Timelines

No.	Deliverable	Draft	Due Date
1	Analytical report: characteristics of FOE	31 October 2023	31 November 2023
2	Impact analysis report: Implications for the transformation of the Alliance's MIOp	31 November 2023	31 December 2023

### 9. Acceptance Criteria

Acceptance criteria for the task includes, but is not limited to the following criteria:

- A. Overall.** Must be based on a technical understanding of the outcomes of the SFA23 and the main NATO strategic documents, be critically and professionally written underpinned by a credible depth of research; it should compel the audience to read, engage and think reflectively about NATO's future.
- B. Draft.** Upon SF Branch's approval of the contractor's concept, a first draft of the narrative will be written. The draft will be provided by 31 Sep 2023, to a selected team of readers for feedback and guidance (SF SME's and an identified set of target audience proxies determined by SF Branch).
- C. Final Draft.** After the draft feedback is discussed with the contractor, the contractor will review and edit the narrative before producing a final draft in accordance with dates set out in point 8 of this document.

### 10. Security

All work supporting the development of the narrative will be unclassified and contractors do not require security clearance. However, contractors will need to sign non-disclosure agreements on insights obtained in order to facilitate creation of the narratives.

### 11. Intellectual Property Rights

All rights reserved by NATO Allied Command Transformation. The narratives may not be copied, reproduced, distributed or publically displayed without approval from ACT StratComm and SF Branches. Products developed for ACT can be further used, modified and republished by ACT SF Branch as required. Therefore, intellectual property rights for any service and product by the contractor shall be owned in perpetuity by HQ SACT.

### 12. Security Considerations for the Deliverable

There are no security considerations. The deliverable will not be classified and, therefore, will not bear any classification markings.

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### **13. Releasability**

NATO nations have regulations and laws applying to the export of defence 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 regards to the Intellectual Property Rights. The StratCom Branch will hold releasability control.

**HQ SACT GENERAL TERMS AND CONDITIONS DATED 01/26/2022 ARE APPLICABLE TO THIS PROCUREMENT AND CAN BE LOCATED ON THE ACT WEBSITE AT [WWW.ACT.NATO.INT/CONTRACTING](http://WWW.ACT.NATO.INT/CONTRACTING) UNDER CONTRACTOR INFORMATION.**



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## Annex B

### Compliance Matrix

Contractor's technical proposals will be assessed on the qualifications of the both the company and individuals proposed to perform the work. Individuals' résumés will be measured against each of the criteria specified below in order to ascertain whether the individuals have adequate qualifications to be considered compliant. (HQ SACT reserves the right to conduct technical discussions of nominated candidates).

**Examples of how detailed knowledge levels were attained are expected. Ultimately Contractor companies shall clearly demonstrate by providing unequivocal reference to where company/key personnel meet the criteria set forth in this solicitation (please include page number, reference to CV or links as applicable).**

Requirements	Compliant (C) /Non-compliant (NC)
1. Demonstrable technical, analytical and strategic foundation with an in-depth understanding of NATO doctrine, military operations and strategies and strategic foresight and analysis.	
2. Demonstrable experience conducting strategic military analysis	
3. Demonstrated proficiency in English as defined in STANAG 6001 (Standardized Linguistic Profile (SLP) (Written and Oral). NATO: 3333.	
4. Company and proposed candidate(s) are from NATO member nation.	
5. <b>At least one submission of past performance experience within the last seven years.</b>	