

**RFP-ACT-SACT-23-90**



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

**Request for Proposal**

**RFP-ACT-SACT-23-90**

**Long-Term Military Strategic Shaping – Terrorist Groups**

**And Organisations' Approach To Gaining Military**

**Advantage**

**Bidding Instructions**

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## 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.

### 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

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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 **7 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.
- (b) In lieu of a bidder’s conference, HQ SACT invites bidders to submit initial technical and contractual questions not later than **26 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:

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<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 **31 July 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)
- 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-23-90\_Tech\_ABC Inc. / RFP-ACT-SACT-23-90\_Price\_ABC Inc.). **Allow sufficient time in your submission should you encounter e-mail size challenges.**

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- (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.
- (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

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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-23-90**

It is hereby stated that our company has read and understands all documentation issued as part of RFP-ACT-SACT-23-90. Our company proposal submitted in response to the referenced solicitation is fully compliant with the provisions of RFP-ACT-SACT-23-90 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-23-90**

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-23-90 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>Draft Analytical Report:</b> LTMSS (15000 - 20000 words) Due Date: 16 October 2023	\$
<b>Final Analytical Report:</b> LTMSS (15000 - 20000 words) Due Date: 29 December 2023	\$

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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 (HQ SACT)**

**STATEMENT OF WORK**

**for**

**Long-Term Military Strategic Shaping – Terrorist Groups and Organisations’ Approach to Gaining Military Advantage**

**1. Introduction**

The North Atlantic Council endorsed Warfare Development Agenda (WDA) outlines how Allied Command Transformation (ACT) will deliver a paradigm shift in the way NATO advances its understanding of the complexities and multi-faceted challenges associated with the future operating environment. ACT is, therefore, responsible for developing the necessary means to explore how it increases its overall awareness of emerging global trends and strategic risks, and how it can instigate processes to introduce appropriate mitigations and preparations to maintain a long-term informed strategic advantage. To enable this, ACT is developing key work-strands under the Warfare Development Imperative (WDI) of Cognitive Superiority. At the heart of this initiative, the Long-Term Military Strategic Shaping (LTMSS) process aims to deliver advice on how military and non-military shaping options could address adverse (and favourable) trends of the future.

**2. Background and Scope of Work**

To develop the contextual baseline of current threats and challenges and to communicate the requirement for NATO to develop an LTMSS capability, ACT has initiated a series of projects and studies within the Cognitive Superiority WDI to reflect the current global strategic environment and the strategic military capabilities trajectories of key NATO threats and challenges.

A key focus of this particular study is to consider the evolution of terrorist groups and organisations and their military strategies and capabilities from early 2000s through 2040s. This assessment and trend projection will need to take into account appropriate political, economic, technology and military aspects that represent the complexities of the evolving strategic environment. The deliverables, must therefore, consider:

- a. Key relevant political, economic and military-strategic factors driving the evolution of the terrorist groups and organisations, their strategic behaviours and capabilities;

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- b. Key discernible tenets that define their military-strategic and operational thinking;
- c. An assessment of the long-term trajectory (2000s to 2040s) of the main capabilities of terrorist groups and organisations;
- d. Access of terrorist groups and organisations to new, emerging and dual-use technologies, including to conduct cognitive / information operations
- e. Main military-strategic implications for NATO, falling out of the above assessment.

### 3. Tasks and Deliverables

A. The contractor shall research and develop a single report. The product can be delivered electronically.

- a. **Conduct Research.** The contractor shall conduct research along the lines outlined in paragraph 2 above. This research will include original source documents but also encompass materials at the discretion of the contractor in order for them to establish a credible analytical report. The contractor must have a technical, analytical and strategic foundation with an in-depth understanding of terrorist groups and organisations.
- b. **Report Development.** The contractor will generate a concise report (complete with executive summary, research analysis and conclusion) outlining the evolution of terrorist groups and organisations, their strategy and capabilities between 2000s-2040s. This will be discussed with the HQ SACT SALT team (virtually).
- c. **Narrative.** The narrative will be between 15000 – 20000 words and encapsulate themes aligned with the requirements of Cognitive Superiority WDI's LTMSS LoD. The contractor must have a background of proven previous performance in conducting strategic military analysis.

B. The Contractor shall produce the following deliverables:

Ser	Deliverable	Due Date
1	Draft Analytical Report: LTMSS (15000 - 20000 words)	16 October 2023
2	Final Analytical Report: LTMSS (15000 - 20000 words)	29 December 2023

### 4. Place of Performance

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- A. Place of Performance.** Contractor's personnel are expected to perform the required work at the Contractor's facility. Necessary engagement and additional coordination may be done remotely. Travel is not required for this Statement of Work (SoW).
- B. Travel.** Travel (and related expenses) will not be covered under this contract, but if needed, shall be handled separately in accordance with the ACT Financial Manual, Section 24 "Contractor Travel". Additional travel requirements will be coordinated as needed.

### 5. Contractor Performance Requirements and Reporting

- A.** A Contracting Officer's Technical Representative (COTR) shall be assigned by the Contracting Officer. The COTR shall provide direction, guidance, and support information as needed for all technical and content areas of the SOW.

The COTR shall:

- a. Provide directions, guidance and support information requests, as required, for all process and content areas of the SoW.
  - b. Resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of LTMSS.
  - c. Review (and approve) all Contractor duties for completeness and accuracy.
  - d. Review the Contractor's work at a minimum of monthly, or more often if needed.
- B.** The COTR's written approval of work reported and deliverables submitted is mandatory for Contractor invoices to be successfully processed. The COTR shall receive a letter of appointment from the Contracting Officer that describes in detail his roles and responsibilities to which he shall sign formal acceptance.
  - C.** 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.

### 6. Contract Reporting

- A.** As specified in paragraph 3 – Overview of Tasks and Deliverables, the Contractor shall submit a draft and final report to the COTR and the Contracting Officer. The report shall include, but not be limited to, the following information:
  - a. Name (s) of contractor personnel assigned to work.
  - b. Summary of work for tasking and deliverables for the reporting period.
  - c. Tasking and deliverables met for reporting period.
  - d. Interim tasking and deliverables (interim and final) to be met for the coming month.
  - e. Current or anticipated problems/deficiencies and recommended solutions.

**7. Evaluation Criteria**

**A. Technical Approach**

- a. Contractor must be able to perform work as outlined in this SOW and will be scored in accordance with the elements listed in the Compliance Matrix – Annex B.
- b. Contractor must be able to demonstrate technical, analytical and strategic foundation with an in-depth understanding of terrorist groups and organisations.
- c. Contractor must be able to demonstrable experience conducting strategic military analysis.

**B. Past Performance**

- a. Contractor must be able to provide at least one submission of past performance experience within the last seven years.
- b. Further details for past performance criteria is referenced in Enclosure 2 of this RFP.

**8. 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 LTMSS (baselining geopolitical and operating environment trends with military and non-military instruments of power implications), 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 SALT Branch’s approval of the contractor’s concept, a first draft of the narrative will be written. The draft will be provided by **16 October 2023**, to a selected team of readers for feedback and guidance (SALT and an identified set of target audience proxies determined by SALT 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 by **29 December 2023**.

**9. Security**

All work supporting the development of the narrative will be unclassified and contractors do not require security clearance. The deliverables will not contain any sensitive information, will not be classified and, therefore, will not bear any classification markings.

**10. 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 SALT Branches. Products developed for ACT can be further used, modified and republished by ACT SALT Branch as required. Therefore, intellectual property rights for any service and product by the contractor shall be owned in perpetuity by HQ SACT.

**11. Security Considerations for the Deliverable**

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

**12. 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)
Company is headquartered in one of the NATO Countries with proposed candidates that are citizens of and resident in NATO nations. (Nationality must be provided and any secondary or dual citizenships clearly specified).	
Demonstrated proficiency in English as defined in STANAG 6001 (Standardized Linguistic Profile (SLP) (Written and Oral). NATO: 3333.	
Demonstrable technical, analytical and strategic foundation with an in-depth understanding of terrorist groups and organisations.	
Demonstrable experience conducting strategic military analysis.	
At least one submission of past performance experience within the last seven years.	