



## **NORTH ATLANTIC TREATY ORGANISATION**

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

## **Request for Proposal**

**RFP-ACT-SACT-25-03**

**INITIATION AND RESEARCH OF AN EMERGING NATO CONCEPT**

**RFP-ACT-SACT-25-03**

## **Bidding Instructions**

## RFP-ACT-SACT-25-03

### Table of Contents

|   |    |
|---|----|
| RFP-ACT-SACT-25-03.....                                   | 1  |
| INITIATION AND RESEARCH OF AN EMERGING NATO CONCEPT ..... | 1  |
| BIDDING INSTRUCTIONS .....                                | 5  |
| 1. General.....   | 5  |
| 2. Classification .....                                   | 5  |
| 3. Definitions.....                                       | 5  |
| 4. Eligibility.....                                       | 5  |
| 5. Duration of Contract.....                              | 6  |
| 6. Exemption of Taxes .....                               | 6  |
| 7. Amendment or Cancellation .....                        | 6  |
| 8. Bidder Clarifications .....                            | 6  |
| 9. Bid Closing Date .....                                 | 7  |
| 10. Bid Validity.....                                     | 7  |
| 11. Content of Proposal .....                             | 7  |
| 12. Proposal Submission .....                             | 7  |
| 13. Late Proposals .....                                  | 8  |
| 14. Bid Withdrawal .....                                  | 8  |
| 15. Bid Evaluation .....                                  | 8  |
| 16. Proposal Clarifications .....                         | 8  |
| 17. Award.....  | 9  |
| 18. Communications.....                                   | 9  |
| 19. Points of Contact:.....                               | 9  |
| Enclosure 1: Proposal Content / Checklist .....           | 10 |
| Enclosure 2: Compliance Statement .....                   | 10 |
| Enclosure 3: Past Performance Information Form .....      | 11 |
| Enclosure 4: Price Proposal.....                          | 13 |
| Annex A STATEMENT OF WORK (SOW) .....                     | 19 |
| 1. Introduction.....                                      | 19 |
| 2. Background .....                                       | 19 |
| 3. Strategic Context.....                                 | 19 |
| 4. Scope of Work.....                                     | 20 |
| 5. Task 1 (Initiation Management) Summary: .....          | 20 |
| 6. Type of Contract and Period of Performance.....        | 21 |

## RFP-ACT-SACT-25-03

|  |    |
|--|----|
| 7. Tasking and Deliverables.....   | 21 |
| 8. Acceptance Criteria.....  | 25 |
| 9. Contractor Performance Requirements and Reporting .....                                   | 25 |
| 10. Supervision and Reporting .....  | 26 |
| 11. Personnel Required for Statement of Work .....   | 26 |
| 12. The proposed key personnel shall have the following combined minimum<br>experience. .... | 26 |
| a. Familiar with the NATO Concept Development & Experimentation Method.....                  | 26 |
| 13. Essential requirement .....  | 27 |
| • Fluent in English, written and oral; .....   | 27 |
| 14. Education.....   | 27 |
| 15. Time Requirements for Contractor Personnel (if applicable).....                          | 27 |
| 16. Proof of Past Performance .....  | 27 |
| 17. Place of Performance .....   | 27 |
| 18. Required Travel for Personnel Service Contract (if applicable) .....                     | 27 |
| 19. Furnished Materials and Services (if applicable) .....                                   | 27 |
| 20. Physical Security .....  | 27 |
| 21. Security Considerations for the Deliverables (if applicable) .....                       | 28 |
| Annex B Requirements Matrix .....  | 29 |

**BIDDING INSTRUCTIONS**

**1. General**

This is a Firm Fixed Price deliverable contract in accordance with the HQ SACT General Terms and Conditions; Contract Award is contingent upon funding availability; Partial bidding is not allowed.

**HQ SACT GENERAL TERMS AND CONDITIONS DATED 03/13/2024 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.**

**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**

This RFP is open to governmental or commercial entities:

- (a) Established in a North Atlantic Treaty Organisation Alliance member nation.
- (b) Working in the required field and legally authorised to operate in the country or countries in which this contract is to be performed at the time of bidding.
- (c) 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:
  - 1. Base Period **01 JAN 2025 – 31 DEC 2025**
  - 2. Option Periods:
    - a. **01 JAN 2026 – 31 DEC 2026**
    - b. **01 JAN 2027 – 31 DEC 2027**

Option periods shall be exercised at the sole discretion of the HQ SACT Contracting Officer, based on satisfactory work performance, availability of funding, and ongoing evolving requirements. Option periods will relate to later phases of the concept's development (Development through to Approval), with definition of scope determined following each phase of delivery.

**6. Exemption of Taxes**

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.

**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 bidders' conference, HQ SACT invites bidders to submit initial technical questions no later than **15 Dec 2024**.
- (c) Information in response to all inquiries / requests for clarification to a prospective bidder shall be furnished to all prospective bidders at

## RFP-ACT-SACT-25-03

<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 17 Jan 2025 0900 hours, Eastern Standard 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, and website;
- (b) Compliance statement (See Enclosure #1)
- (c) Past performance (See Enclosure #2); references will be accepted in lieu of past performance;
- (d) Provision of technical and price volumes;
- (e) Compliance matrix (See Annex B to Statement of Work).

### 12. Proposal Submission

- (a) Proposals shall be submitted electronically in two separate PDF documents; One containing the Technical Proposal and one containing the Price Proposal, each emailed separately to:
- (b) Technical Proposal: [hqsact.techproposal@nato.int](mailto:hqsact.techproposal@nato.int)
- (c) Price Proposal: [hqsact.priceproposal@nato.int](mailto:hqsact.priceproposal@nato.int)
- (d) Email subjects shall include the solicitation information along with company name (for example: RFP-ACT-SACT-25-03\_Tech\_ABC Inc. / RFP-ACT-SACT-25-03\_Price\_ABC Inc.). Allow sufficient time in your submission should you encounter email size challenges.
- (e) Price proposals shall be in U.S. Dollar currency. Contractor may request payment post award in alternate currency based on agreed conversion rate.
- (f) Prices shall be on a Firm Fixed Price Basis and include any relevant discount schedule.
- (g) No oral bids or oral modifications or telephonic bids shall be considered.

## RFP-ACT-SACT-25-03

- (h) 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 email exchange due to the 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.
- (b) HQ SACT is not responsible for any content that is not clearly identified in any proposal package.
- (c) Proposals shall be evaluated and awarded based upon the proposal that represents the best value to NATO. The following factors are considerations:
  - 1. Successful administrative submission of bid packages as requested paragraph 11, as listed in this RFP.
  - 2. Successful determination of compliance with mandatory criteria. (Compliant/non-compliant)
  - 3. Technical factors / pricing factors rated the following: **Technical / Price = 70/30**
  - 4. 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**

- (a) HQ SACT intends to award a firm fixed price contract to the Offeror whose proposal represents the Best Value offer to NATO. Partial awards will not be considered.
- (b) HQ SACT will collect information from references provided by the Offeror in regard to its past performance. Contractors must provide authorization to contact references.
- (c) 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 regarding 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:**

**(PLEASE INCLUDE ALL BELOW ON ALL CORRESPONDENCE)**

Tonya Bonilla, ACT Contracting Officer,

757-747-3575, Tonya.bonilla@nato.int

and

Louise Syms, ACT Contracting Specialist

757-747-3788, louise.syms@nato.int

## **RFP-ACT-SACT-25-03**

### **Enclosure 1: Proposal Content / Checklist**

#### **PROPOSAL CONTENT / CHECKLIST**

##### Table of Contents

- ☐ Bidder's name, address, POC, Contact numbers, email address.
- ☐ Compliance Statement.
- ☐ Past Performance (including References).
- ☐ Technical Proposal.
- ☐ Price Proposal
- ☐ Compliance matrix (See Annex B to Statement of Work).

### **Enclosure 2: Compliance Statement**

#### **COMPLIANCE STATEMENT TO SEALED BID RFP-ACT-SACT-25-03**

## RFP-ACT-SACT-25-03

It is hereby stated that our company has read and understands all documentation issued as part of RFP-ACT-SACT-25-03. Our company proposal submitted in response to the referenced solicitation is fully compliant with the provisions of RFP-ACT-SACT-25-03 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> |
|---------------|---------------------------------------|
| -----         | -----                                 |
| -----         | -----                                 |
| -----         | -----                                 |
| -----         | -----                                 |
| -----         | -----                                 |

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

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

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

Bidder's proposal must be based on full compliance with the terms, conditions and requirements of the RFP and all future clarifications and/or amendments. The bidder may offer variations in specific implementation and operational details provided that the functional and performance requirements are fully satisfied. In case of conflict between the compliance statement and the detailed evidence or explanation furnished, the detailed evidence/comments shall take precedence/priority for the actual determination of compliance. Minor or non-substantial deviations may be accepted. Substantial changes shall be considered non-responsive.

### **Enclosure 3: Past Performance Information Form**

**(Company is required to submit minimum of one – references may be submitted in lieu of past performance).**

### **PAST PERFORMANCE INFORMATION FORM**

Contracting Entity:

## **RFP-ACT-SACT-25-03**

Contract No:

1. Type of Contract (Firm Fixed Price, IDIQ, Requirements):
2. Title of Contract:
3. Description of Work Performance and Relevance to Current Acquisition (Type of facility, capacity, estimated patronage, summary of staff used):
4. Contract Dollar Amount:
5. Period of Performance:
6. Name, Address, Fax and Telephone No. of Reference:
7. Indicate Whether Reference Acted as Prime or Sub-contractor:
8. Comments regarding compliance with contract terms and conditions:
9. Complete Contact Information for client:
10. Permission to contact client for reference: Yes/ No

**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.**

## Enclosure 4: Price Proposal

### SEALED BID PRICE PROPOSAL

#### SUBJECT: RFP-ACT-SACT-25-03

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 AVT financial Manual. <https://www.act.nato.int/images/stories/budfin/afm24.pdf>

Price proposal subject to contract award review shall be for base period for performance only. Option periods, if exercised, shall be priced once deliverables have been clearly identified. Similar pricing structure/strategy with fair market increase is expected for option periods and option period pricing is subject to fair and reasonable price determination.

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-25-03 and the “**Insert: Company Name Technical Proposal**”, submitted in accordance with solicitation provisions.

| Serial                  | Activity   | Deliverables   | Deadline  | Price |
|-------------------------|--|--|---|-------|
| <i>Initiation Phase</i> |  |  |   |       |
| 1                       | Identify and engage Community of Interest (Col) and stakeholders | <b>Stakeholder Analysis</b><br>The document to identify and refine nations, organizations, agencies, inter alia who may have a vested interest in the project and, through the analysis assign levels of interest to each.   | <b>Within 2 months after Contract Award and no later than 25 April 2025</b> | \$    |
| 2                       | Support to Kick-off Workshop                                     | The first formal workshop of the project. The outcome should be agreements on the division of work and research assignments. Specific deliverables will include: <ul style="list-style-type: none"><li>- Event Read Ahead and Agenda</li><li>- Identification of and coordination with key participants</li><li>- Data collection at the event</li><li>- Provision of Subject Matter Expert (SME) inputs</li><li>- Production of post-event report</li></ul> | NLT<br>30 Jan 2025  | \$    |

**RFP-ACT-SACT-25-03**

|   |   |  |                    |    |
|---|---|--|--------------------|----|
| 3 | Research and Experimentation Plan             | The document to identify analytical, experimentation and research initiatives required to initiate and research the concept to Ver 0.1 in line with CD&E Handbook guidelines.  | NLT<br>28 Feb 2025 | \$ |
| 4 | Develop resource requirements                 | <b>Estimation of Required Resources</b><br>The document identifying the internal and external resources available to support the work. May include time, funding, personnel, and logistical and technological support.   | 28 Feb 2025        | \$ |
| 5 | Define scope                                  | <b>Problem Statement</b>   | 30 April 2025      | \$ |
| 6 | Study Existing Solutions and related projects | <b>Existing Solutions Paper</b><br>- The document to identify what is already out there that may solve the problem.  | 30 April 2025      | \$ |
| 7 | Initial Concept Development Plan              | The document indicating:<br>- Key milestones and decision points;<br>- Proposed product delivery dates;<br>- Synchronization with key events necessary for successful implementation; key decision or information events; significant exercise or modelling and simulation events<br>- Key resourcing requirements<br>- Initial plans for Col engagements (e.g., Workshops, conferences) | 31 May 2025        | \$ |
| 8 | Concept Proposal                              | The document (point paper) that clearly and concisely describes the problem, the rough conceptual idea of how to solve the problem, and its scope. It should include the following:<br>- Title;<br>- Motivation – the problem to be solved, requirements to be satisfied, the capability to be improved or effect to be  | 31 May 2025        | \$ |

## RFP-ACT-SACT-25-03

|                       |                                 |  |                                |    |
|-----------------------|---------------------------------|--|--------------------------------|----|
|                       |                                 | <p>delivered, and justification for an innovative approach;</p> <ul style="list-style-type: none"> <li>- Description and scope of the concept;</li> </ul> <p>Suggestion of where the concept might fit in relation to other NATO concepts.</p>   |                                |    |
| <i>Research Phase</i> |                                 |  |                                |    |
| 9                     | Support to Discovery Experiment | <p>An experiment to better understand the problem, explore the capability gaps, define the operating environment, or outline potential solutions.</p> <p>Specific deliverables will include:</p> <ul style="list-style-type: none"> <li>- Event Read Ahead and Agenda</li> <li>- Identification of and coordination with key participants</li> <li>- Data collection at the event</li> <li>- Provision of Subject Matter Expert (SME) inputs</li> </ul> <p>Production of post-event report</p> | <p>NLT</p> <p>30 June 2025</p> | \$ |
| 10                    | Design Concept                  | <p>The document that sets an initial layout of the concept.</p>  | <p>30 June 2025</p>            | \$ |
| 11                    | Support to Solution Workshop    | <p>A workshop focused on identifying potential solutions or lines of development.</p> <p>Specific deliverables will include:</p> <ul style="list-style-type: none"> <li>- Event Read Ahead and Agenda</li> <li>- Identification of and coordination with key participants</li> <li>- Data collection at the event</li> <li>- Provision of Subject Matter Expert (SME) inputs</li> <li>- Production of post-event report</li> </ul>   | <p>NLT</p> <p>31 July 2025</p> | \$ |
| 12                    | Develop metrics                 | <p>The document to support future analysis and experimentation activities (e.g., Measures of Performance (MoPs), Measures of Effectiveness (MoEs)).</p>  | <p>31 July 2025</p>            | \$ |

**RFP-ACT-SACT-25-03**

|    |  |  |                          |    |
|----|--|--|--------------------------|----|
| 13 | Update Research and Experimentation Plan             | The document indicating activities, milestones, output, and risks for consecutive stage  | 30 September 2025        | \$ |
| 14 | Identify exercises and experimentation opportunities | The document identifying a need for experimentation and exercises that may be suitable for further exploration of the problem, and / or potential solutions  | 30 September 2025        | \$ |
| 15 | Identify exercises                                   | The document that will identify future exercises and/or other venues that could be used to conduct experimentation.  | NLT<br>30 September 2025 | \$ |
| 16 | Identify Potential Solutions                         | The MS Word document identifies potential solutions for the problem, based on outcomes from Solution Workshop and Alternative Analysis techniques.   | 31 October 2025          | \$ |
| 17 | Experimentation and Analysis Support Plan            | The MS Office document considers analysis and experimentation approaches that could be used to further test and validate the concept.  | NLT<br>31 October 2025   | \$ |
| 18 | Updated Concept Development Plan                     | The MS Word document – an update of the Initial Concept Development Plan. It identifies past and future key activities, milestones, outputs, consumed and needed resources, and risks.   | 31 October 2025          | \$ |
| 19 | Initial Concept ver 0.1                              | <p>The MS Word document describes the concept design concisely and logically with a clear problem description, scope, and potential solutions. The format should include the following:</p> <ul style="list-style-type: none"> <li>- Preface - will later become Executive Summary - one page only</li> <li>- Introduction</li> <li>- Concept Statement, Vision, or Definition: <ul style="list-style-type: none"> <li>- Aim, Purpose, and Objectives;</li> <li>- Scope including limitations.</li> </ul> </li> <li>- Background, to include:</li> </ul> | 31 December 2025         | \$ |



**RFP-ACT-SACT-25-03**

|  |  |   |              |           |
|--|--|---|--------------|-----------|
|  |  | <ul style="list-style-type: none"><li>- The Military Problem, Shortfalls, or Deficiencies;</li><li>- Future Operational Context, Missions, or Operational Construct.</li><li>- Summary of initial literature search</li><li>- Linkage to:<ul style="list-style-type: none"><li>- Strategic Vision and/or Strategic Guidance;</li><li>- Other Concepts (as appropriate).</li></ul></li><li>- Principles, Central and Supporting Ideas.</li><li>- Conclusions.</li><li>- Recommendations.</li><li>- Appendices – as required.</li></ul> |              |           |
|  |  |   | <b>Total</b> | <b>\$</b> |

**Please verify and acknowledge propriety of above, by duly completing signatures on the next page.**

**Authorizing Company Official:**

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

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

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

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

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

**Company Name Witness Official:**

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

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

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

**STATEMENT OF WORK (SOW)  
INITIATION AND RESEARCH OF AN EMERGING  
NATO CONCEPT**

**20. Introduction**

- a. The Allied Command Transformation, Strategic Plans and Policy Directorate, Concept Development (CNDV) Branch is tasked to develop strategic concepts. This SOW relates to a single concept development effort and requires Subject Matter Expertise to support the identified the deliverables.
- b. Due to resource limitations within HQ SACT, contractor support is required to support the development of these high-profile deliverables on time.

**21. Background**

- a. NATO CD&E defines concept development as: activities aimed at capturing the best ideas and exploring solutions to current and future issues, capability shortfalls, or gaps; or approaches to exploit future opportunities resulting in the publication of a concept. Sometimes concept development may prove that an idea or solution will not work.
- b. These efforts are typically multi-year projects that incorporate 5 distinct development phases: Initiation, Research, Development, Refinement and Validation, and Approval. There are additional Pre-Initiation and Post-Approval activities. A detailed guide to NATO CD&E can be found publicly [here](#).

**22. Strategic Context**

- a. The NATO Warfighting Capstone Concept (NWCC) was approved in 2021. It contributes to the Alliance's efforts to strengthen its deterrence and defense posture and offers a vision in support of maintaining and further developing NATO's decisive military advantage and continuously adapting the military instrument of power (MloP) through to 2040.
- b. The NWCC is part of the coherent package of NATO Military Authorities best military thinking. Along with the 2020 Concept for Deterrence and Defense of the Euro-Atlantic Area, the NWCC implements the 2019 NATO Military Strategy, a renewed approach setting out Alliance military-strategic objectives and the ways and means to implement them.
- c. The NWCC provides five warfare development imperatives (WDI) to focus and synchronise efforts to develop the MloP. They provide an organizing principle that promotes coherence across the breadth of warfare development efforts. They offer a new, forward-looking multi-domain (land, maritime, air, cyber, and space) and cross-instruments of power approach to military thinking, organizing, and acting.

## RFP-ACT-SACT-25-03

- d. In the future operating environment of more persistent and boundless competition, in which elements of MloP is simultaneously employed in shaping, contesting and fighting inside and outside Supreme Allied Commander Europe's area of responsibility, the Alliance needs to move towards a more integrated, multi-domain approach to defense, and, ultimately, a more persistent operational posture. Integrated Multi-Domain Defense WDI supports the Alliance's strategic anticipation, widens the decision space for political authorities, and is critical for the MloP's ability to out-fight and out-last any adversary, protecting the Alliance's integrity to decide and act against threats in any domain, regardless of their origin or nature.
- e. WDIs are immediately usable and implementable through the lines of delivery (LoD) developed with the support of Allies, Supreme Allied Commander Europe, operational commanders and NATO HQ staffs, and engagement with Allies' academic communities.
- f. The specific conceptual area that will be explored in this CD&E effort is still under the process of pre-initiation. The nature of this SoW is primarily to provide and support the Management component of the CD&E methodology. As such, topic-specific knowledge is less important than expertise and experience in managing, controlling, and coordinating innovation or research projects at a similar scale.

### 23. Scope of Work

- a. The work in this SOW consists of two discrete components: **Concept Development Initiation Management**, and **Concept Development Research Planning, Coordination, and Integration**.
- b. With the active participation and involvement of Headquarters Supreme Allied Command Transformation (HQ SACT), the contractor shall contribute to development of and provide the series of deliverables to eventually deliver the Initial Concept Ver 0.1 no later than (NLT) the end of 2025. Findings and acceptance of the Initial Concept Ver 0.1, will inform follow on work in 2026 and 2027.

### 24. Task 1 (Initiation Management) Summary:

Main task: To contribute and provide deliverables to support the development and production of the **Concept Proposal** for the designated concept. This task is to be achieved through two Lines of Effort - LOEs:

- Concept Management
- Concept Development

## RFP-ACT-SACT-25-03

### Task 1: Concept Management (CM LoE)

Overall project coordination and synchronisation. Quality assurance and resource scheduling and deliverables integration. Daily management with weekly verbal reports to the assigned Project Lead and COTR.

Sub-task 1.1. To facilitate kick-off workshop.

Sub-task 1.2. To support ACT in identifying, recording, and monitoring stakeholders.

Sub-task 1.3. To deliver Initial Concept Development Plan.

Sub-task 1.4. To deliver Updated Concept Development Plan.

### Task 2: Concept development (CD LoE)

Overall coordination and execution of research, analysis and experimentation. Daily management with weekly verbal reports to the assigned Project Lead and COTR.

Sub-task 2.1. To deliver Concept Proposal.

Sub-task 2.2. To deliver Concept Research and Experimentation Plan.

Sub-task 2.3. To deliver and facilitate research activities and analysis efforts.

Sub-task 2.4. To facilitate discovery experiments.

Sub-task 2.5. To facilitate solution workshop.

Sub-task 2.6. To deliver Initial Concept Ver 0.1

## 25. Type of Contract and Period of Performance

- a. **Type of Contract:** This is a firm fixed price deliverables contract.
- b. **Period of Performance.** The contract period of performance is from 01 Jan to 31 Dec 2025 with the possibility of two, up to 12-month option periods 01 Jan – 31 Dec 2026 and 01 Jan – 31 Dec 2027. Option periods shall be exercised at the sole discretion of the Contracting Officer based on continuing operational requirement, availability of funds and satisfactory performance. The option periods will relate to later phases of the concept's development (Development through to Approval), with definition of scope determined following each phase of delivery.

## 26. Tasking and Deliverables

## RFP-ACT-SACT-25-03

All tasks and deliverables should be conducted in line with guidance contained in the NATO CD&E Handbook. The following provides a summary of the deliverables, but detailed descriptions for expectations for how to deliver, what is included in the tasks and supporting activities, and scope of tasks and activities should be drawn from the CD&E Handbook: [https://www.act.nato.int/wp-content/uploads/2023/05/NATO-ACT-CDE-Handbook\\_A\\_Concept\\_Developers\\_Toolbox.pdf](https://www.act.nato.int/wp-content/uploads/2023/05/NATO-ACT-CDE-Handbook_A_Concept_Developers_Toolbox.pdf)

| Serial                  | Activity   | Deliverables  | Schedule/<br>Remarks   |
|-------------------------|--|---|--|
| <i>Initiation Phase</i> |  |   |  |
| 1                       | Identify and engage Community of Interest (CoI) and stakeholders | <b>Stakeholder Analysis</b><br>The document to identify and refine nations, organizations, agencies, inter alia who may have a vested interest in the project and, through the analysis assign levels of interest to each.  | Within 2 months after Contract Award and no later than 26 April 2024 |
| 2                       | Support to Kick-off Workshop                                     | The first formal workshop of the project. The outcome should be agreements on the division of work and research assignments.<br>Specific deliverables will include: <ul style="list-style-type: none"> <li>- Event Read Ahead and Agenda</li> <li>- Identification of and coordination with key participants</li> <li>- Data collection at the event</li> <li>- Provision of Subject Matter Expert (SME) inputs</li> <li>- Production of post-event report</li> </ul> | NLT<br>30 Jan 2025   |
| 3                       | Research and Experimentation Plan                                | The document to identify analytical, experimentation and research initiatives required to initiate and research the concept to Ver 0.1 in line with CD&E Handbook guidelines.   | NLT<br>28 Feb 2025   |
| 4                       | Develop resource requirements                                    | <b>Estimation of Required Resources</b><br>The document identifying the internal and external resources available to support the work. May include time, funding, personnel, and logistical and technological support.  | 28 Feb 2025  |
| 5                       | Define scope   | <b>Problem Statement</b>  | 30 April 2025  |

## RFP-ACT-SACT-25-03

|                       |   |  |                     |
|-----------------------|---|--|---------------------|
| 6                     | Study Existing Solutions and related projects | <b>Existing Solutions Paper</b> <ul style="list-style-type: none"> <li>- The document to identify what is already out there that may solve the problem.</li> </ul>   | 30 April 2025       |
| 7                     | Initial Concept Development Plan              | The document indicating: <ul style="list-style-type: none"> <li>- Key milestones and decision points;</li> <li>- Proposed product delivery dates;</li> <li>- Synchronization with key events necessary for successful implementation; key decision or information events; significant exercise or modelling and simulation events</li> <li>- Key resourcing requirements</li> <li>- Initial plans for Col engagements (e.g., Workshops, conferences)</li> </ul>  | 31 May 2025         |
| 8                     | Concept Proposal                              | The document (point paper) that clearly and concisely describes the problem, the rough conceptual idea of how to solve the problem, and its scope. It should include the following: <ul style="list-style-type: none"> <li>- Title;</li> <li>- Motivation – the problem to be solved, requirements to be satisfied, the capability to be improved or effect to be delivered, and justification for an innovative approach;</li> <li>- Description and scope of the concept;</li> </ul> Suggestion of where the concept might fit in relation to other NATO concepts. | 31 May 2025         |
| <i>Research Phase</i> |   |  |                     |
| 9                     | Support to Discovery Experiment               | An experiment to better understand the problem, explore the capability gaps, define the operating environment, or outline potential solutions.<br>Specific deliverables will include: <ul style="list-style-type: none"> <li>- Event Read Ahead and Agenda</li> <li>- Identification of and coordination with key participants</li> <li>- Data collection at the event</li> <li>- Provision of Subject Matter Expert (SME) inputs</li> </ul>   | NLT<br>30 June 2025 |

## RFP-ACT-SACT-25-03

|    |  |  |                                     |
|----|--|--|-------------------------------------|
|    |  | Production of post-event report  |                                     |
| 10 | Design Concept                                       | The document that sets an initial layout of the concept.   | 30 June 2025                        |
| 11 | Support to Solution Workshop                         | <p>A workshop focused on identifying potential solutions or lines of development.</p> <p>Specific deliverables will include:</p> <ul style="list-style-type: none"> <li>- Event Read Ahead and Agenda</li> <li>- Identification of and coordination with key participants</li> <li>- Data collection at the event</li> <li>- Provision of Subject Matter Expert (SME) inputs</li> <li>- Production of post-event report</li> </ul> | <p>NLT</p> <p>31 July 2025</p>      |
| 12 | Develop metrics                                      | The document to support future analysis and experimentation activities (e.g., Measures of Performance (MoPs), Measures of Effectiveness (MoEs)).   | 31 July 2025                        |
| 13 | Update Research and Experimentation Plan             | The document indicating activities, milestones, output, and risks for consecutive stage  | 30 September 2025                   |
| 14 | Identify exercises and experimentation opportunities | The document identifying a need for experimentation and exercises that may be suitable for further exploration of the problem, and / or potential solutions  | 30 September 2025                   |
| 15 | Identify exercises                                   | The document that will identify future exercises and/or other venues that could be used to conduct experimentation.  | <p>NLT</p> <p>30 September 2025</p> |
| 16 | Identify Potential Solutions                         | The MS Word document identifies potential solutions for the problem, based on outcomes from Solution Workshop and Alternative Analysis techniques.   | 31 October 2025                     |
| 17 | Experimentation and Analysis Support Plan            | The MS Office document considers analysis and experimentation approaches that could be used to further test and validate the concept.  | <p>NLT</p> <p>31 October 2025</p>   |
| 18 | Updated Concept Development Plan                     | The MS Word document – an update of the Initial Concept Development Plan. It identifies past and future key activities, milestones, outputs, consumed and needed resources, and risks.   | 31 October 2025                     |
| 19 | Initial Concept ver 0.1                              | The MS Word document describes the concept design concisely and logically  | 31 December 2025                    |



## RFP-ACT-SACT-25-03

|  |  |   |  |
|--|--|---|--|
|  |  | <p>with a clear problem description, scope, and potential solutions. The format should include the following:</p> <ul style="list-style-type: none"><li>- Preface - will later become Executive Summary - one page only</li><li>- Introduction</li><li>- Concept Statement, Vision, or Definition:<ul style="list-style-type: none"><li>- Aim, Purpose, and Objectives;</li><li>- Scope including limitations.</li></ul></li><li>- Background, to include:<ul style="list-style-type: none"><li>- The Military Problem, Shortfalls, or Deficiencies;</li><li>- Future Operational Context, Missions, or Operational Construct.</li></ul></li><li>- Summary of initial literature search</li><li>- Linkage to:<ul style="list-style-type: none"><li>- Strategic Vision and/or Strategic Guidance;</li><li>- Other Concepts (as appropriate).</li></ul></li><li>- Principles, Central and Supporting Ideas.</li><li>- Conclusions.</li><li>- Recommendations.</li><li>- Appendices – as required.</li></ul> |  |
|--|--|---|--|

### 27. Acceptance Criteria

Acceptance criteria for each deliverable will be in line with the guidance in the CD&E Handbook, with appropriate context specific requirements. These will be established in detail at the Kick-Off meeting, in consultation with the stakeholders. Part of any bid should provide estimate of output and work against each deliverable to enable effective and collaborative establishment of deliverable acceptance criteria.

### 28. Contractor Performance Requirements and Reporting

The Contracting Officer Technical Representative (COTR) is responsible to:

- a. Resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the SOW;
- b. Review and approve all Contractor outputs/products for completeness and accuracy;

## **RFP-ACT-SACT-25-03**

- c. The COTR shall review the Contractor's work at regular intervals as required. The COTR's written approval of work reported, and deliverables submitted is mandatory for Contractor invoices to be successfully processed.
- d. The COTR/D-COTR shall receive a letter of appointment from the Contracting officer that describes in detail his/her roles and responsibilities to which he/she shall sign formal acceptance.

### **29. Supervision and Reporting**

- a. The Contractor shall report to the COTR and the Contracting officer, detailing progress on the SOW for the reporting period. The report shall include, but not be limited to, the following information:
- b. Summary of work (by contractor position) for tasking and deliverables for the reporting period.
- c. Current or anticipated problems/deficiencies and recommended solution.
- d. The COTR may amend the reporting requirements to receive alternate and/or additional data and information on a more frequent or less frequent basis and may request other reports that detail designated aspects of the work or methods to remedy problems and deficiencies. The Contracting Officer shall receive at least one monthly report, regardless of COTR changes. However, note that the report is NOT a deliverable subject to acceptance.

### **30. Personnel Required for Statement of Work**

The Contractor team shall have the following experience and qualifications as a minimum. This experience should include knowledge in the following areas:

### **31. The proposed key personnel shall have the following combined minimum experience.**

### **32. Familiar with the NATO Concept Development & Experimentation Method**

Minimum of 5 years of experience in the field of CD&E or comparable experience.

- a. The contractor should have extensive experience of managing research or innovation projects
- b. Familiar with the process in integrating the function of scientific operational analysis with military planning, for example through use of experiments or war-games based on appropriate scenarios.;
- c. Familiar with NATO, 2022 NATO Strategic Concept.

## **RFP-ACT-SACT-25-03**

- d. Demonstrate ability to design, support and execute events like war-games or experiment type activities to support concept development;
- e. Demonstrate ability to assess research, analysis, and content across the multitude of technology, concepts and issues involved in the military affairs;
- f. Administrative and office environment experience including experience with MS Office applications;

### **33. Essential requirement**

### **34. Fluent in English, written and oral;**

### **35. Education**

- Masters degree or similar national academic qualification, or equivalent military education (Command and Staff College level), or 5 years professional experience in conceptual work.

### **36. Time Requirements for Contractor Personnel (if applicable)**

Not applicable.

### **37. Proof of Past Performance**

### **38. Place of Performance**

Work under this contract will be conducted at the contractor's premises, including virtual meetings and in-person meetings with HQ SACT

### **39. Required Travel for Personnel Service Contract (if applicable)**

40. In general, several (Estimated 6 meetings in Norfolk, US) and events in Europe (Estimated 3-4 events in Europe) external workshops and engagements are anticipated for this contract. Contractor travel will be reimbursed IAW the ACT 60-1 Chap 24. **Estimated travel costs should not be included in the contractor's cost proposal.**

### **41. Furnished Materials and Services (if applicable)**

Not applicable.

### **42. Physical Security**

## **RFP-ACT-SACT-25-03**

- a. **Personnel Clearances.** The work may eventually include classified components, having the ability to work at NATO SECRET is not mandatory but would be an advantage.
- b. **Security Conditions.** Contractor must adhere to current security conditions at HQ SACT and other work sites. Contractor personnel shall comply with all the local host nation, NATO security provisions and other policies and procedures, as required.
- c. **Electronics, Devices.** The Contractor shall abide by the security restrictions regarding carrying and using electronic devices (e.g., laptops, cell phones) in the HQ SACT. The Contractor shall be responsible for staying the necessary clearance from the HQ SACT Security Office before bringing any such device into the HQ SACT work. If required, as determined by the COTR, HQ SACT may provide access to NATO ICT capabilities, but otherwise, the contractor will provide their own equipment,

### **43. Security Considerations for the Deliverables (if applicable)**

Not applicable.

## RFP-ACT-SACT-25-03

### Annex B Requirements Matrix

Contractors' technical proposals will be assessed on the qualifications of the individual(s) proposed to perform the work. Individual résumés will be measured against each of the criteria specified below to ascertain whether the individuals have adequately demonstrated that they possess the required qualifications. The contractor shall clearly demonstrate the proposed individual(s)'s ability to meet the criteria set forth in this solicitation. HQ SACT may interview nominated individual(s).

Bidder Name

Candidates Name

Each candidate **MUST** have a separately completed Annex A

| SE<br>R | ITEM  | COMPLIANT   | NOT<br>COMPLIANT                                       |
|---------|---|---|--|
| 1       | Proposed candidate is national of NATO Member nation  |   |  |
| 2       | Possess a master's degree in political studies, international affairs, security/defense/war studies, or related field of study. Alternatively, completed an equivalent national military education (Command and Staff College or War College). Alternatively, I can demonstrate 5 years' professional experience in concept development, or related area of work.                       |   |  |
| 3       | Demonstrated fluency in English. When not a native English speaker, the individual should fulfil at least SLP 3333 (ref. STANAG 6001) or equivalent English Language tests (TOEIC "Speaking and Writing" or TOEFL or IELTS). The contractor shall provide this certification with their proposal (score assigned based on proposed candidate with the lowest achieved education level). |   |  |
| 4       | Practical experience with productivity software (Microsoft Teams, Word, PowerPoint, and Excel)  |   |  |
| SE<br>R | CRITERIA  | RANGE <sup>1</sup>  | SCORE<br>COMPLIANT<br>(Out of 100<br>pts) <sup>2</sup> |
| 5       | Experience with the NATO Concept Development and Experimentation method (CD&E Handbook) or national equivalent.   | No experience or familiarity: 0<br>Familiar with theory and practical experience <5 years: 1-5<br>Practical experience >5 years: 6-15 |  |

## RFP-ACT-SACT-25-03

|    |  |   |  |
|----|--|---|--|
| 6  | Experience with managing and conducting R&D or concept development projects related to the defense and security environment.                           | No experience: 0<br>Practical experience < 5years: 1-5<br>Practical experience > 5 years: 6-15            |  |
| 7  | Demonstrated ability to clearly convey complex subject matter in writing to a general audience.  | Limited to basic ability: 0<br>Practical experience: 1-5<br>Published works demonstrated: 6-10            |  |
| 8  | Previous involvement in the ongoing NATO concept development projects as developers, experimenters, or researchers.                                    | No involvement: 0<br>Involved more than 1 year ago: 1-10<br>Involved less than a year ago (recent): 11-20 |  |
| 9  | Contractor has, or has capacity to gain, NATO SECRET clearances for relevant personnel.  | 1-5   |  |
| 10 | Demonstrated ability to design, support and organise concept related events (workshops, war games, experiments, etc.).                                 | < 1 year: 0<br>> 2 years: 1-5<br>> 5 years: 6-10  |  |
| 11 | Expertise on strategic level key threats and challenges for NATO   | Limited to basic knowledge: 0<br>Practical knowledge: 1-5<br>Applied knowledge: 6-15                      |  |
| 12 | Demonstrate ability to assess research, analysis, and content across the multitude of technology, concepts and issues related to defense and security/ | < 3 years: 1-5<br>> 3 years: 6-10   |  |
|    |  |   |  |
|    |  |   |  |
|    | Max score: 100 points  | Score of the candidate:   |  |