

RFP-CO-424373-ON-X
REQUEST FOR PROPOSAL



OPERATIONAL NETWORK EXTENSION (ON-X)

2025/9IS03214

Book I

PROJECT-SPECIFIC BIDDING INSTRUCTIONS

FOR

NCIA SOLICITATIONS

UNDER THE NATO COMPETITIVE PROCUREMENT METHOD

BEST VALUE

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SECTION 1. INTRODUCTION

1. Incorporation of General Bidding Instructions

- (a) These project-specific bidding instructions, hereinafter referred to as “*Project-Specific Book I*”, addresses requirement-specific conditions, evaluation criteria, and any deviations or additions necessary for RFP-CO-424373-ON-X, hereinafter referred to as the “Solicitation”.
- (b) In addition to the instructions contained in this *Project-Specific Book I*, Bidders shall refer to the *General Bidding Instructions*, which establish the standard, baseline rules and procedures applicable to all NATO Communications and Information Agency (NCIA) solicitations issued under the procedure for NATO Competitive Procurement (NCP).
- (c) In the event of any discrepancies between the *General Bidding Instructions* and the *Project-Specific Book I*, the terms outlined in this *Project-Specific Book I* shall prevail. This ensures that Bidders adhere to the unique needs and requirements of each individual procurement.
- (d) The *General Bidding Instructions* are publicly accessible on NCIA’s website under Procurement>Documents and Resources>[Terms and Conditions](#) for reference at any time. For convenience, a direct download link is provided [here](#).
- (e) Legal disclaimer: During the entirety of the bidding and competitive process, bidders must ensure compliance with their applicable laws, regulations, international standards, guidelines, industry best practices and NATO / NCIA Policies. NCIA reserves the right to audit or request independent verification for compliance purposes of areas including but not limited to the Responsible and Acceptable Use of Artificial Intelligence, Conflict of Interests, Supply Chain and (Cyber)Security. Nothing contained in or relating to these bidding instructions shall be deemed to constitute a waiver of any of the privileges and immunities of NCIA and NATO

2. Scope of Work

- (a) The scope of work is the provision, operation and continuous evolution of the Operational Network Extension (ON-X): a sovereign NATO Enterprise cloud capability, up to and including NATO SECRET, delivered and operated as a managed service.
- (b) The Contractor will work collaboratively with the Purchaser and any other Purchaser-appointed service providers to deliver the required outcomes in accordance with applicable requirements, policies, directives or standards as per Performance Work Statement (PWS) set out in Book II.
- (c) The PWS, set out in Book II, including its annexes, describe the outcomes, implementation requirements, targets, deliverables and other commitments and will be released at step 2. A high level draft is provided at Step 1.

3. Overview of the Prospective Contract

- (a) The successful Bidder shall perform the Work in accordance with Book II, which is the prospective contract. The full Book II will be released at Step 2. Step 1 release of Book II is purely for information purposes and does not commit Purchaser to the content of Book II for Step 2.
- (b) Contract type will be an Indefinite Delivery Indefinite Quantity (IDIQ) on a 10 years period of ordering and with a guaranteed minimum ordering at award of 30 MEUR. Task Orders

under the resulting IDIQ contract will be issued and priced as Firm-Fixed-Price (FFP) instruments against the Contractor's priced service catalogue, established at Step 2 of this source selection and refined over the life of the contract.

- (c) Contract award shall be made to the Bidder(s) whose bid(s) are determined to be successful in accordance with the evaluation methodology specified in the Project-Specific Book I after Step 2 amendment.
- (d) Without prejudice to any of the terms of this Solicitation, any IDIQ contract(s) awarded as a result of this Solicitation shall not be regarded as a promise on the part of the Purchaser with regards to the placement of any orders beyond the minimum guarantee. Orders beyond the minimum guarantee will be awarded solely on the basis of the actual need of the Purchaser during the course of the contract's performance validity period.
- (e) ON-X is intended to be procured as an outcome-based managed service under one accountable prime contractor. Existing Operational Network services are expected to transition from NATO Operated to Contractor Operated while remaining NATO-owned unless the solicitation expressly provides otherwise. A new General-Purpose Cloud (GPC) service infrastructure is intended to be contractor-provided and contractor-operated.
- (f) The precise ownership and financing structure of contractor-provided infrastructure may include direct ownership, leasing, financing arrangements or approved subcontracting, provided that the prime contractor remains fully responsible for Contract performance.
- (g) Under all delivery arrangements, NATO will retain the sovereign governance, data, cryptographic-key, security, accreditation, audit, direction, emergency-control, step-in and exit rights specified in the prospective Contract.
- (h) The prospective contract will be governed by Book II, Part II (NCIA Contract Special Terms and Conditions (STC)), and Part III (NCIA Contract General Terms and Conditions (GTC)).

(i) Applicable NCIA Contract Terms and Conditions

- (j) The material provided at Step 1 of this Solicitation constitute NCIA's initial project-specific contractual requirements (Special Terms and Conditions - STCs) and are provided for information purposes pending finalization of the STCs for this project at Step 2 and the resulting competitive dialogue. NCIA reserves the right, at any time during the procurement process, to amend, supplement, update, clarify or replace contractual provisions. For instance, the Contractual Guidelines and/or the STCs prior to the Contract Award.
- (k) Bidders admitted to the Step 2 Competitive Range will receive a detailed Contractual Compliance Table, through which they may indicate compliance with, or propose deviations from, a limited number of contractual provisions (STCs) identified by NCIA. Any proposed deviations, reservations or non-acceptance of contractual provisions may be taken into account as part of the evaluation of the bidder's proposal. Deviation from the proposed STCs may therefore negatively impact a bidder's final evaluation score or lead to disqualification if the deviation is deemed unacceptable.
- (l) Any amendments to the STCs will be communicated in writing to all remaining bidders during the procurement process. Bidders shall be deemed to have taken such amendments into account in their proposals. Nothing in the Step 1 material shall constitute a formal offer to contract nor be construed as limiting NCIA's rights or creating any obligation to maintain the contractual provisions in their current form until Contract Award.

(1) NCIA Contract General Terms and Conditions

- (i) The Core-NCIA Contract GTC apply to this procurement as provided in SECTION 1.11(a) of the *General Bidding Instructions*. The applicable GTC subset(s) for this procurement, according to its nature and type, are those marked (as “Yes”) below. The Purchaser marks the applicable subset(s) and records the applicable GTC version prior to issuance of the solicitation.

	GTC Subset:	Applies:
1	GTC - Services	Yes
2	GTC - Equipment	N/A
3	GTC - Commercial Off-The-Shelf (COTS) Software or Licenses	Yes
4	GTC - Software Developed for North Atlantic Treaty Organization (NATO) Purposes	Yes
5	GTC - Cloud Services	Yes
6	GTC - Artificial Intelligence (AI) Systems or AI-Enabled Services	Yes

Table 1: GTC Subsets

(ii) Applicable GTC version

- (A) The version in effect on the date of issuance of this solicitation, incorporated by reference under the General Bidding Instructions and available at the NCIA’s website under Procurement>Documents and Resources>[Terms and Conditions](#). The version number of this document appears in the lower left corner of the cover page and indicates the month and year of release in parentheses. Bidders shall prepare their bid against this version. Where an STC applies, it is set out at the location indicated above and takes precedence over the GTC to the extent of any conflict. Previous versions (if any) are available upon request to the Purchaser’s Point of Contact.

(2) NCIA Contract Special Terms and Conditions

(i) Applicable as set out in the accompanying Book II-Part II to this solicitation

4. Solicitation Participation Requirements

- (a) This Solicitation is open only to Bidders from the participating nations contributing to the project, namely those listed in Table 2 of SECTION 2.1. In SECTION 1.4(b) of the *General Bidding Instructions*, is the information on Declaration of Eligibility.

5. Security Classification of the Solicitation and Planned Contract

(a) Solicitation

- (1) The overall security classification of this Solicitation is NATO UNCLASSIFIED when separated from the NATO RESTRICTED Annexes.
- (2) Step 1 does not require any Classified Annexes. Details on Step 2 requirements will be share through a Step 2 amendment.

(b) Planned Contract

- (1) The security classification of the planned contract is: NATO SΞcret. This classification requires the successful Bidder to have a:
 - (i) Facility Security Clearance – NATO SΞcret
 - (ii) Personnel Security Clearance – NATO SΞcret / C0smic Top SΞcret Level (for specific admin profiles)
 - (iii) Project Security Instructions (PSI) included in the Performance Work Statement at Step 2

6. Two-steps Source Selection

- (a) This Solicitation is **one source selection conducted in two successive steps**. It is not two separate procurements. Bidders' standing in Step 1 governs only admission to Step 2. Step 2 evaluation will then be conducted against the Step 2 criteria only.
- (b) Step 1 - Competitive Range Establishment (purpose of this current Book I):
 - (1) Step 1 is a past-performance based, adjectival evaluation. No price is submitted or evaluated at Step 1. Up to three (3) bidders will be selected in Step 1, admitted to the competitive range and will proceed to Step 2. The criteria and standard by which Step 1 bids are evaluated are set out in Section 4 of this Book I.
- (c) Step 2 – Price and Technical Offer, Demonstrator and Dialogue, Best and Final Offer (BAFO):
 - (1) Submit an initial offer consisting of a technical proposal, a price proposal (based on bidder proposed service catalogue and a notional scenario based on volumetric data provided by the Purchaser in the Purchaser Input Pack), proposed red-lines against Book II negotiable terms and draft Task Order to cover the Proof Of Concept (POC scope);
 - (2) Develop and present a demonstrator based on operational use cases provided by the Purchaser;
 - (3) Present both initial offer and demonstrator to the Purchaser in the context of competitive dialogue; and
 - (4) Submit a Best and Final Offer (BAFO), which will form the basis for the final best-value evaluation and apparent winning bidder determination.
- (d) The Purchaser reserves the right to award a contract at the conclusion of Step 2 without conducting negotiations or competitive dialogue, in accordance with the GBI SECTION 2.14(b)(3), if it determines that the bids received permit an award decision without further exchange.
- (e) A bidder's Step 1 ratings establish the competitive range only. Step 2 bids are evaluated against the Step 2 criteria only that will be published in the Step 2 RFP amendment. No Step 1 rating, strength, weakness, or discriminator is carried forward into, or presumed to influence, the Step 2 evaluation.
- (f) The Purchaser reserves the right to refine requirements, assumptions, evaluation activities and supporting documentation throughout the procurement process. Where such refinements are necessary, they will be communicated to all participating Bidders through

formal RFP Amendments in accordance with the procurement rules and principles of fairness, transparency and equal treatment.

(g) Each Bidder admitted to the competitive range will be offered a separate contract providing for fixed payment of 4 MEUR against completion and acceptance of defined Step 2 deliverables. The Step 2 RFP amendment and demonstrator contract will specify the applicable conditions. Admission to the competitive range does not, by itself, constitute an entitlement to payment.

(h) All necessary information is provided in the Solicitation documents, and any additional questions may be submitted in writing in accordance with in SECTION 2.8 of the *General Bidding Instructions*.

(i) The following is the current indicative timeline:

Step	Milestone	Planned completion/date
Step 1	RFP issue	31 July 2026
Step 1	Bid closing	24 September 2026
Step 2	Step 2 RFP issue	30 October 2026
Step 2	Initial bid closing	27 January 2027
Step 2	Demonstrations and competitive dialogue	5-29 February 2027
Step 2	BAFO closing	25 March 2027
Step 2	Contract award	29 April 2027

END OF SECTION 1

SECTION 2. GENERAL BIDDING INFORMATION

1. Solicitation Details

	Topic:	Details:	General Bidding Instructions Reference:
1.	Declaration of Eligibility Required	Yes	SECTION 1.4(b)
2.	Evaluation Method	Best Value Tradeoff-Adjectival	SECTION 1.5
3.	Contract Type	Indefinite Delivery Indefinite Quantity (IDIQ)	SECTION 3.7(c)(8)
4.	Contract Ordering Period	Ordering Period: ten (10) year(s)	n/a
5.	Solicitation Point of Contact (PoC)	Anil Rao Contracting Officer	SECTION 2.7
6.	Bidding Email Address	RFP-CO-424373-ON-X@ncia.nato.int	SECTION 2.7
7.	Participating Nation(s)	Albania, Belgium, Bulgaria, Canada, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Lithuania, Luxembourg, Montenegro, Netherlands, North Macedonia, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Türkiye, United Kingdom, and United States	SECTION 1.4, SECTION 2.1(a)(8)
8.	Bid Validity Period	six (6) months	SECTION 2.15
9.	Competitive Dialogue or Negotiation	Purchaser intends to award a contract <u>with</u> Competitive Dialogue or Negotiation. See paragraph 5(a) below for further information.	SECTION 2.14(b)
10.	Technical Bid Submission Format	A Written Bid is required for this solicitation at Step 1.	SECTION 2.11
11.	Anticipated Effective Start Date of Contract (ESD)	ESD aligns with Contract Signature Date	SECTION 1.12

Table 2: Solicitation Details

2. Bid Delivery and Bid Closing

- (a) The closing date and time for the electronic submission of bids in response to this Solicitation is **24 September 2026, 12:00 hours Central European Time (CET)** and is herein referred to as the “Bid Closing Date” (BCD).

- (b) Bids shall be submitted to the bidding email address listed in Table 2 of SECTION 2.1.

3. Purchaser's Point of Contact

- (a) The Purchaser Point of Contact (PoC) for all information concerning this Solicitation is stated in Table 2 of SECTION 2.1.
- (b) All correspondence related to this Solicitation, including the actual bid submission, shall be sent to the solicitation's email address specified in Table 2 of SECTION 2.1.

4. Bid Validity

- (a) Bidders shall be bound by the term of their bids for the validity period listed in Table 2 of SECTION 2.1, starting from the BCD.

5. Performance Guarantee

- (a) No overall contract performance guarantee is required for this procurement.

6. Competitive Dialogue or Negotiation

- (a) The Purchaser intends to conduct structured competitive dialogue and/or negotiation during Step 2 with the Bidders admitted to the competitive range. The Step 2 RFP amendment will define the further process details for this Step.
- (b) Exchanges may be conducted in writing, orally, or through another method stated in that amendment. The Step 2 participation payment and its conditions will be governed exclusively by the separate participation agreement described in Section 1.6 and will not affect the conduct or outcome of the evaluation.
- (c) All interactions will be conducted in accordance with the GBI and the principles of fairness, transparency, non-discrimination and equal treatment. Information or changes of common relevance will be communicated to all Bidders in the competitive range on an equal basis and, where they modify the Solicitation, through a formal RFP amendment.
- (d) No Bidder is entitled to a minimum number or particular form of exchanges. The Purchaser may determine that no dialogue or negotiation round is necessary, or may limit, suspend or conclude the dialogue or negotiation once it has obtained sufficient information. In either case, the Purchaser may proceed to request BAFOs without further exchanges. No substantive revision will be permitted after the final BAFO deadline except as allowed by the GBI.
- (e) Solicitation confidentiality and the use of information are governed by GBI SECTION 1.3(c). Bidders shall identify and mark commercial proprietary information in accordance with GBI SECTION 2.23; blanket or non-specific markings may not satisfy that requirement.

END OF SECTION 2

SECTION 3. STEP 1 BID PREPARATION INSTRUCTIONS

1. File Naming Convention

- (a) For Step 1, Bidders shall structure their submissions in accordance with the following volume structure and file naming conventions:

#	Bidding Volume:	Naming Convention:
1	Volume 1 – Administration	RFP-CO-424373-ON-X–Company Name–Vol 1–Admin
2	Volume 2 – Technical	RFP-CO-424373-ON-X–Company Name–Vol 2–TM
3	Volume 3 – Corporate Experience	RFP-CO-424373-ON-X–Company Name–Vol 3–CER

Table 3: File Naming Convention

2. Bidder's Checklist

- (a) The Bidder shall complete the “Included in Bid” column in each of the Bidder's Checklist tables below (Tables 4 through 7), entering a checkmark (✓) for every item included in its bid and “N/A” for any optional item not submitted, and shall include a version of the completed tables in the Administration Volume. The completed checklist serves to verify the completeness of the bid across all four Volumes; entries shall indicate inclusion only and shall not state or otherwise reveal any prices. Marking an item on the checklist does not substitute for the actual submission of that item in the relevant Volume.

- (b) **Page and format rules.** All volumes shall be submitted in A4 format, portrait orientation (landscape permitted for individual tables or figures), with margins of no less than 2 cm and body text of no less than 11 points (no less than 9 points in tables, figures and footnotes). Stated page limits include all narrative text, tables and figures within the relevant volume or part and exclude the cover page, table of contents. Appendix D CER forms are subject only to their own limit of three (3) pages per form. Pages in excess of a stated page limit will not be considered.

(1) Volume 1: Administration

(i) Step 1 – Appendix A Admin Requirements

#	Item	Quantity and Format	Included in Bid (✓ / N/A)
1	Prime Accountability and Reference-Lock Joint Statement signed	Signed pdf	
2	Minimum revenue - Minimum average annual global revenue (turnover): 500 MEUR, calculated over the three most recently completed financial years. Revenue may be aggregated across members that have signed the Prime Accountability and Reference-Lock Joint Statement. Where a Bidder relies on parent-company revenue, the required parent-company guarantee shall be submitted with Volume 1. The Bidder shall provide audited financial statements, or equivalent officially certified accounts, for each entity whose revenue is relied upon, together with a calculation of the three-year average	Signed pdf	

Table 4: Administration Volume Bidder's Checklist

(2) Volume 2: Step 1: Transformation Management and Risk Management

#	Item	Bid Submission & Presentation Format	Quantity and Format	Maximum Page Limit	Included in Bid (✓ / N/A)
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1	Part A — Transformation Management	IAW item 12 in Table 2	1 PDF file	15	
2	Part B — Risk Management	IAW item 12 in Table 2	1 PDF file	10	
Total Maximum Page Limit for Volume 2				25	

Table 5: Technical Volume Bidder's Checklist

(i) Part A - Transformation Management (maximum 15 pages)

(A) TM1-TM5 are Step 1 capability-evidence criteria. They identify the areas in which the Purchaser requires evidence of relevant capability and past performance. Each TM response shall be supported by at least one of the three Corporate Experience References submitted in Volume 3.

(B) For every example, assign a unique Part A Example ID in the format `TM[1-5]-[sequential number]` (for example, `TM1-01`), identify the applicable CER ID and one or more Appendix D evidence IDs in the format `[CER-ID]-D1` through `[CER-ID]-D7` or `[CER-ID]-P1` through `[CER-ID]-P5`, and explain the example's relevance to the TM criterion. Each example shall state:

(1) The customer and contract

(2) The legal entity that performed the work and its actual role

(3) The operating context and scale

(4) The Action taken and result achieved

(5) Any material problem, corrective action and lesson subsequently implemented

(C) A Volume 3 reference may support more than one TM criterion only where the response explains its distinct relevance to each criterion. Additional claims from work outside the three Volume 3 references may be included as supplementary evidence if a verifiable customer contact is provided. Such supplementary evidence does not replace the requirement to support each TM criterion with at least one Volume 3 reference.

(D) For each sub-criterion please respond to the following content:

(1) TM1 Service Transition and Operational Continuity

Demonstrate a takeover, cutover, exit or handover of a live service while maintaining operational continuity. The evidence shall show how knowledge transfer, staff turnover or critical-role changes, workforce readiness, decision rights and customer/supplier interfaces were controlled, and the effect on service availability or customer KPIs through handover.

Current facility and environment readiness (maximum one page). Without presenting an ON-X architecture or proposed solution, identify existing facilities and environments currently operated by the Bidder or identified provider. For each, state the environment type; country or sanitized location; basis of access or control; independence of sites, availability zones or failure domains; current operational and accreditation status; indicative available capacity; earliest credible mobilization date; and any dependency on new construction, new commercial agreement, accreditation, equipment procurement or Purchaser action. A binding reservation,

lease, subcontract or dedication of capacity to ON-X is not required at Step 1.

(2) TM2 Organizational Transformation

Demonstrate an implemented operating-model or organizational transformation across multiple stakeholders or entities. The evidence shall show adoption in practice: role clarity, governance, communication, management of resistance to change, skills transfer, supplier ownership and reduced customer dependency. Where material, show how cost transparency, allocation or FinOps changed consumption, capacity, Capex or total-cost-of-ownership decisions and produced a measured result.

(3) TM3 Crisis Management and Operational Resilience

Demonstrate management of a material all-hazards disruption, or an executed contingency or failover exercise, affecting live services. The evidence shall show detection and escalation, crisis governance, stabilization and protection of critical services, recovery against defined objectives, service and customer impact, and a structural improvement proven after the event or exercise. Evidence is not limited to military or government scenarios.

(4) TM4 Secure Operations

Demonstrate sustained secure operations in a classified, sovereign or high-assurance regulated environment. The evidence shall show how authorization and continuous compliance were maintained through change, and how a material security, insider or privileged-access, cross-domain or cross-tenancy risk was detected, contained and remediated, including the effect on service and on people, process and governance controls.

(5) TM5 Future-Proof Migration and Interoperability

Demonstrate forward-looking interoperability and migration leadership across a mixed estate comprising, as applicable, private cloud, public or dedicated cloud, on-premises, hybrid and legacy services. The evidence shall show federation across independent boundaries, phased coexistence and decommissioning as well as the ability to integrate new technologies and innovations in support of operational needs or to respond to changing standards or directives without loss of continuity. Include interoperability or service-impact results and the people, process and governance changes that enabled adaptation.

(E) Bidders should describe problems encountered and the corrective actions taken in each example. The Purchaser will consider a candid account of problems and corrective action as evidence of experience and delivery maturity.

(F) Every claim in Part A shall be traceable to a contract referenced in Volume 3 through clear referencing. Where a claim rests on work not covered by a Volume 3 reference, the Bidder shall name a verifiable customer contact for that claim. Repeating the same example under multiple sub-criteria receives no additional credit unless the response explains its distinct relevance to each.

(ii) Part B - Risk Management (maximum 10 pages)

(A) Part B tests the Bidder's own risk foresight. The Bidder shall itself identify the risks it considers most critical to the success of a program of the nature and

scope described in this Solicitation, including risks that originate on the Purchaser's side. The Risk Map in the Masterfile is

(B) The Bidder shall, in Part B:

- (1)** (a) identify the risks it considers most critical to program success, stating for each why it is critical. A credible risk picture for a program of this nature will normally span delivery, organizational, and Purchaser-side dimensions;
- (2)** (b) for each identified risk, evidence from the contracts referenced in Volume 3 what the Bidder did or did not do when the same or a similar risk arose: the mitigation applied (or the omission and its consequences), how its effect was measured, the delta between expected and actual outcome, and the lessons implemented in subsequent work. The evidence is given either by cross-referencing a Part A example by its Example ID or as a new example in the card's fields.
- (3)** (c) for a Purchaser-side risk, identify from cited prior work the relevant customer dependency or enabling action, the mitigation actually used, how responsibilities were allocated, and the measured result. Explain why that evidence is relevant to ON-X. Do not propose an ON-X mitigation or request a Purchaser commitment at Step 1.

(C) As with Part A, all claims shall be traceable to a referenced contract or supported by a named verifiable customer contact.

(D) Not requested in Part B: a technical solution, architecture, or implementation plan for mitigating the risks identified. Part B evaluates the quality of the Bidder's risk foresight and the evidenced credibility of its past mitigation, not a proposed design.

(E) Part A is more important than Part B. Within Part A, the five sub-criteria are of equal importance. The Purchaser will compare the substance underlying the ratings: the specificity and attribution of the evidence, the result against a target or baseline, the credibility of corrective action and implemented learning, the degree of customer verification, transferability to ON-X and the residual performance risk. A difference in adjectival rating, document length, number of examples or number of metrics is not itself a discriminator

(3) Volume 3: Corporate Experience

#	Item	Bid Submission & Presentation Format	Quantity and Format	Maximum Page Limit	Solicitation Reference	Included in Bid (✓ / N/A)
1	Corporate Experience Reference (CER)	Written Only	1 PDF file	3 (page limit per CER form)	General Bidding Instructions SECTION 3.6 and this SECTION 3.2(b)(3)	
2	Customer Validation Form (CVF)	Written Only and submitted directly to the Purchaser by the Reference	1 PDF file	n/a	General Bidding Instructions SECTION 3.6 and this SECTION 3.2(b)(3)	N/A
Total Maximum Page Limit (if up to 3 CER forms are submitted)				9		

Table 6: Corporate Experience Volume Bidder's Checklist

- (i)** The Bidder shall submit three (3), Corporate Experience Reference (CER) forms, attached hereto as Appendix D, to summarize ongoing or past corporate

experience that is relevant to this Solicitation.

(ii) Such CER forms require the Bidder to:

- (A) Provide a summary description of contract work, for each cited reference.
- (B) Explain the relevance of each cited reference with respect to the scope of the PWS and the desired experience listed in [SECTION 3.2\(b\)\(3\)\(iv\)](#).
- (C) Submit referenced work that has occurred within at least the past six (6) years of Bid Closing Date, with a performance duration of at least twelve (12) consecutive months, to be considered recent and, therefore, fit for evaluation.

(iii) **Sourcing of references.** At least one of the three references shall be one in which the Bidder itself performed as prime contractor. References may be drawn from the Bidder and/or from up to two (2) named critical subcontractors. Any critical subcontractor whose reference is used shall sign the Prime Accountability and Reference-Lock Joint Statement at Volume 1 and is thereby locked into the Bidder's team through contract award. Work claimed shall be clearly attributed to the legal entity that performed it. Corporate-group experience is not attributed to the Bidder without a demonstrated performance nexus (role, decision rights, workforce and outcomes controlled).

- (A) If the Bidder includes the use of subcontractors in its bid, then the Bidder shall provide no more than one (1) recent and relevant completed CER form for any subcontractor which is anticipated to provide a critical portion of the effort required.
- (B) Each customer validation submission shall correspond to the same customer contract and scope of work as its associated CER and shall carry the same CER ID. A validation submitted for a different contract, project or scope may not be considered.
- (C) The Purchaser evaluates how well the Bidder performed on the referenced contract, not the classified subject matter of that contract. Sanitized evidence is expected and normal.

(iv) The relevancy of each reference is assessed against the totality of the following published dimensions. No single dimension is an automatic pass/fail threshold. The ON-X Reference Form (Appendix D) maps each reference:

Dimension	Facts to be provided
D1 - Service Transition and Operational Continuity	Executed takeover/cutover, exit or handover of live services; knowledge transfer and workforce mobilization; decision rights and customer/supplier interfaces; continuity and SLA/KPI performance through transition
D2 - Organizational transformation	Implemented operating-model or organizational change; governance and stakeholder complexity; role clarity, governance, adoption and communication; skills transfer; supply-chain ownership; reduced customer dependency; relevant lifecycle/FinOps practice
D3 - Crisis Management and Operational Resilience	Material disruption, failover or contingency exercise; detection and escalation; crisis governance; stabilization and protection of critical services; recovery against objectives; surge or facility/supplier loss; structural improvements implemented

Dimension	Facts to be provided
D4 - Secure Operations	Sustained secure operations in classified, sovereign or high-assurance environments; authorization/accreditation; continuous compliance; serious security, insider or privileged-access incidents; cross-domain/cross-tenancy protection; containment and remediation; cleared workforce
D5 - Migration and Interoperability	Leadership of legacy-to-modern migration, integration or federation across independent boundaries; use of standards; phased coexistence and continuity; interoperability results; cross-domain constraints; decommissioning.
D6 - Operational responsibility, facilities, scale and accountability	Facilities and deployment environments operated, including on-premises, private/dedicated or sovereign cloud, hybrid, federated and air-gapped environments; operational status and basis of control or access; availability; user/service/workload/site scale; number and independence of sites, availability zones or failure domains; operating tempo and duration; geographic spread; entities and suppliers; prime/integrator role, decision rights and supply-chain control.
D7 - Technology and service lifecycle evolution that is future proof	Maintaining technological currency within an operating service; technology refresh; obsolescence and end-of-life identification and replacement; continuity through lifecycle change; measured service or customer results

Table 7: Relevancy Dimension

- (v) In addition to the completion and submission of the CER form, the Bidder shall forward the Customer Validation Form (CVF) to their referenced points of contact (POCs) for completion and direct submission to the Purchaser.
- (vi) Bidders are encouraged to make each referenced point of contact (POC) aware of this process as early as possible and ensure referenced POCs provide the Purchaser with the completed CPQ by no later than the BCD.
- (vii) It is the responsibility of the Bidder to ensure that their reference(s) submits the CVF to the Purchaser on time.
- (viii) The Bidder shall not complete any section of the CVF, except Section I as indicated in the CVF.
- (ix) Per the CVF instructions, referenced Points of Contact (POCs) will be directed to complete and forward CVF forms directly to the Purchaser, by the BCD.
- (x) The CVF shall be sent, from the Bidder's referenced POC, to the Bidding Email Address specified in Table 2 of SECTION 2.1.
- (xi) See SECTION 4.7(a)(1)(v) of the General Bidding Instructions, in the event that the Bidder has no relevant Corporate Experience or no CVF is submitted for respective bids.
- (xii) National S~~E~~CRET -level regimes (for example, UK S~~E~~CRET) and high-assurance regulated environments outside a formal NATO classification are accepted as analogues to NATO S~~E~~CRET experience.
- (xiii) The identity of any customer or reference point of contact is treated as protected information and will be accessible only to the Purchaser evaluation team.

(xiv) Appendix D is used to assess the recency and relevancy of each reference. Appendix E provides customer-validated facts used by the Purchaser to assess quality. Neither form is evaluated against the TM1–TM5 technical rating scale.

(xv) Where confidentiality restrictions prevent disclosure of the customer's identity or full reference details, the Bidder may provide an unclassified abstract using coded identifiers, ranges or normalized measures. The underlying facts and the Bidder's role may then be validated either under an NDA acceptable to the Purchaser and the customer, or by confirmation sent directly by the original customer or contracting authority through an authenticated official channel, which may include the relevant National Delegation as the transmission channel. The confirmer verifies facts only and does not evaluate the reference. The Purchaser will evaluate the verified abstract against the same published criteria as all other references. Information that cannot be verified, or is too abstract to permit evaluation, cannot be credited. No classified information shall be included in the Step 1 submission.

(4) There is no Volume 4 (Price) at Step 1. Price is evaluated at the award step of this two-step source selection (Step 2), once the priced service catalogue and BAFO are submitted. No pricing information, cost model, or FTE estimate relating to the ON-X requirement shall be included anywhere in the Step 1 bid. If included, it will not be read or considered and may render the bid administratively non-compliant under GBI SECTIONS 3.4(b) and 3.5(e). The sole exception is the historic value of a referenced (past) contract, stated in the ON-X Reference Form (Appendix D) as a scale and relevancy indicator and is obviously not considered ON-X price information.

END OF SECTION 3

SECTION 4. STEP 1 BID EVALUATION AND COMPETITIVE RANGE

1. General

- (a) This SECTION governs Step 1 only. For Step 1, the standard GBI checklist and administrative-compliance provisions apply only as expressly tailored to the three Step 1 volumes in SECTION 3. The GBI requirement concerning exceptions to the prospective Contract is not applied as a Step 1 acceptance requirement. The numerical ranges in GBI Table 2 are not used or converted into scores at Step 1 only the adjectival ratings and minimum standards stated in this Project-Specific Book I apply. The standard GBI price-evaluation, apparent-successful-bidder and contract-award provisions, including GBI SECTION 4.9, do not apply at Step 1.
- (b) The purpose of Step 1 is to establish a competitive range of the Bidders that have demonstrated the strongest relevant experience and the lowest credible delivery risk for a program of the nature and scope described in this Solicitation. Evaluation is based on the Step 1 submission required by SECTION 3, including the factual validation obtained under Appendices D and E.
- (c) The Purchaser may perform the evaluation activities in parallel or in another administratively efficient sequence, but a Bidder must satisfy the administrative and minimum acceptability requirements in this SECTION before it may be admitted to the competitive range.
- (d) Step 1 ratings, findings and competitive standing govern admission to Step 2 only. They do not carry forward as a score, ranking, presumption or advantage in Step 2.

2. Evaluation Framework and Relative Importance

- (a) TM1–TM5 are of equal importance within Part A. The Purchaser will not assign numerical scores, apply arithmetic weights, average ratings or create a single overall Step 1 adjective. Corporate Experience confidence terminology and technical adjectival terminology are separate and are not converted into one another.
- (b) The following table is applicable:

Element	Principal evidence	Step 1 determination	Relative importance
Administrative compliance	Volume 1 and applicable eligibility records	Compliant / Non-compliant	Mandatory; not comparatively rated
Corporate Experience	Volume 3; Appendix D; Appendix E; permitted verification	Recency, Relevancy and Quality for each CER; one overall Corporate Experience Confidence rating	Predominant substantive factor
Part A — Transformation Management	Volume 2 Part A, traced to Volume 3	One technical adjectival rating for each of TM1–TM5; one overall Part A rating	Second in importance; more important than Part B
Part B — Risk Management	Volume 2 Part B, traced to Volume 3	One overall technical adjectival rating	Third in importance; material to range selection

Table 8: Step 1 Evaluation Framework

3. Administrative Compliance Evaluation

- (a) The Purchaser will evaluate the Bidder's Administration Volume in accordance with SECTION 4.5 of the *General Bidding Instructions*.
- (1) Receipt by the Bid Closing Date and Time, correct composition and marking, and compliance with the applicable page and file requirements.
 - (2) Submission of the required Volume 1 declarations and signed statements, including the Prime Accountability and Reference-Lock Joint Statement where a critical subcontractor reference is used.
 - (3) Absence of exceptions, conditions or assumptions that modify the prospective Contract or the PWS.
 - (4) The Bidder's eligibility to participate, including a valid Declaration of Eligibility before admission to the competitive range.

4. Volume 2 and 3: Common Evidence Standard

- (a) Across Corporate Experience, Part A and Part B, the Purchaser will assess what was demonstrated against the applicable criteria
- (b) Specificity, traceability, customer confirmation and transferability to ON-X are key elements of assessment. Narrative length, the number of metrics or the number of claimed activities do not themselves earn a stronger assessment. Sanitized descriptions, auditable ranges and normalized measures are acceptable where exact data cannot be disclosed.
- (c) The occurrence of an incident, crisis, missed target or other problem is not by itself a strength or weakness. The Purchaser will assess the Bidder's anticipation, response, accountability, recovery, corrective action and demonstrated learning.
- (d) The same contract fact may inform more than one element only where it proves a distinct proposition in each. Repetition of the same fact, example or result receives no additional credit. Appendices D and E are evidence-capture and validation instruments; they are not separately scored.

5. Volume 2 Part A — Transformation Management Evaluation

- (a) The Purchaser will evaluate each of TM1–TM5 and assign each one a technical adjectival rating. The Purchaser will then assign one overall Part A technical adjectival rating. The ratings are based on the evidence requested in SECTION 3 and the common evidence standard in paragraph 4 above:

Sub-criterion	Evaluation focus
TM1 — Service Transition and Operational Continuity	Executed takeover/cutover and continuity; knowledge and workforce mobilization; operational handover; service evolution; credible current facility/environment readiness
TM2 — Organizational Transformation	Implemented operating-model and behavioral change; governance and stakeholder complexity; role clarity; adoption, skills and knowledge transfer; supply-chain ownership; reduced customer dependency; relevant lifecycle/FinOps practice.

Sub-criterion	Evaluation focus
TM3 — Crisis Management and Operational Resilience	Detection, escalation and governance; operational stabilization and protection of critical services; recovery against objectives; surge or facility/supplier loss; structural improvements demonstrated after an event or exercise.
TM4 — Secure Operations	Secure live operations in classified, sovereign or high-assurance environments; authorization/accreditation; continuous compliance and drift remediation; serious incidents and privileged access; cross-domain/data protection; cleared workforce.
TM5 — Future-Proof Migration and Interoperability	Leadership of legacy-to-modern migration, integration and federation across independent boundaries; standards and identity/service federation; phased coexistence, rollback and continuity; cross-domain constraints; legacy decommissioning.

Table 9: TM evaluation focus

- (b) **TM1 current readiness.** For current facility and environment readiness, the Purchaser will assess the credibility of the Bidder's existing capability or access and the resulting mobilization risk. Reliance on new construction, an unexecuted access arrangement, new authorization or accreditation, or unidentified capacity may increase the assessed risk but is not an automatic failure.
- (c) The following technical adjectival scale applies to each TM sub-criterion, the overall Part A assessment and Part B. It is a risk scale, not a confidence scale and not a numerical score:

Technical rating	ON-X application
Excellent	Exceptional, specific and well-supported evidence materially exceeds the Satisfactory standard and indicates very low execution risk.
Good	Strong, specific and supported evidence exceeds the Satisfactory standard and indicates low execution risk.
Satisfactory	Adequate, relevant and supported evidence meets the requirement and indicates acceptable execution risk.
Marginal	Material weakness, gap, ambiguity or limited evidence indicates high execution risk, even though some useful evidence is present.
Unacceptable	The requirement is not met, the evidence is materially unsupported or deficient, or the response indicates unacceptable execution risk.

Table 10: Technical Rating

- (d) The five TM ratings are not averaged. An Unacceptable rating for any TM produces an Unacceptable overall Part A rating. A Marginal rating for any TM means the overall Part A rating can be no higher than Marginal. Where all five TM ratings are Satisfactory or better, the overall Part A rating is a holistic assessment of the strength, consistency and transferability of the evidence across the five equally important sub-criteria.

6. Volume 2 Part B — Risk Management Evaluation

- (a) The Purchaser will assign one overall technical adjectival rating to Part B using the scale in section 6. Part B evaluates the Bidder's risk foresight and the evidenced credibility of its past risk management, not a proposed ON-X technical solution or implementation plan.
- (b) The Purchaser will consider:

- (1) whether the Bidder identifies and prioritizes the risks that are most material to a program of this nature and scope, rather than maximizing the number of risks listed
 - (2) the quality of the causal analysis, interdependencies and understanding of delivery, organizational, security, operational and Purchaser-side risk
 - (3) traceable evidence of what occurred on referenced work, the mitigation used or omitted, its measured effect, the delta between expected and actual outcome and the lesson subsequently implemented
 - (4) for Purchaser-side risks, the specificity and credibility of evidence from cited prior work concerning the dependency or enabling action, the mitigation actually used, allocation of responsibilities and measured result, and the relevance of that evidence to ON-X
- (c) The Purchaser does not use an unpublished model risk list or a coverage checklist. A candid, evidenced account of a risk that materialized, including unsuccessful mitigation and the resulting change in practice, may demonstrate greater maturity than an unsupported assertion that risks were fully controlled.

7. Volume 3: Corporate Experience Evaluation

- (a) The Purchaser will evaluate for each CER, separate Recency, Relevancy and Quality assessments using the adjectival scales in GBI SECTION 4.7.

CER assessment	ON-X application
Recency	How recently, and for how long, the claimed entity performed the work, against the recency and minimum-duration requirements in SECTION 3.
Relevancy	Assessed against the totality of the published ON-X relevance dimensions in SECTION 3 and Appendix D.
Quality	Taking into account contractual or operational results; customer impact; handling of problems; corrective action; sustained improvement; and the consistency and reliability of available validation.

Table 11: CER Assessment

- (b) Only experience attributable to the Bidder or the named critical subcontractor that performed the work is considered. Corporate-group reputation or experience is not attributed without a demonstrated performance link in the submitted bid.
- (c) The Purchaser will consider Appendix D, the customer's direct Appendix E response, clarifications permitted by the GBI and other reliable information lawfully available to the Purchaser. A correction or contradiction is assessed on its substance. A missing response or an 'Unable to verify' response is not treated as adverse performance and is not treated as confirmation; it limits the weight and certainty of the affected claim. The Purchaser will consider the reason for the limitation, the materiality of the claim and any other corroboration.
- (d) After considering all three CERs, the Purchaser will assign one overall Corporate Experience Confidence rating as per following table. It is not an average of the CER assessments and no CER receives a confidence rating.

Overall confidence	ON-X decision meaning
Very High Confidence	Compelling, recent and highly relevant evidence, with consistently strong and credible performance results, supports very low performance risk.
High Confidence	Strong relevant evidence and credible results support low performance risk; any limitations are minor.
Satisfactory Confidence	Adequate relevant and credible evidence supports acceptable performance risk; limitations do not materially undermine readiness.
Low Confidence	Material gaps, weak attribution, inconsistent results or limited validation create substantial performance risk.
No Confidence	Little or no credible relevant evidence, or materially adverse facts, create unacceptable performance risk.

Table 12: Confidence Rating

8. Minimum Standards for Competitive-Range Eligibility

- (a) A Bidder is eligible for comparative competitive-range consideration only where all the following minimum standards are satisfied:

Volume	Minimum standard
1 - Administrative compliance	Compliant, including a valid Declaration of Eligibility before Bid Closing Day
2 - Corporate Experience	Satisfactory Confidence or higher
3 - Part A	Satisfactory or higher for every TM1–TM5 sub-criterion and for Part A overall
3 - Part B	Satisfactory or higher

Table 13: Minimum Competitive Range Eligibility

- (b) The standards are non-substitutable: strength in one element does not cure failure to meet a minimum standard in another. If fewer than two Bidders satisfy all minimum standards, the Purchaser will determine the appropriate course under the governing procurement rules and communicate any resulting action equally; the published standards will not be silently relaxed for an individual Bidder.

9. Competitive-Range Selection

- (a) The Purchaser will compare the eligible Bidders and admit the most highly rated Bidders to the competitive range with a target of three Bidders.
- (b) Corporate Experience is first in order of importance then Volume 3 Part A and subsequently Part B. The Purchaser will compare the underlying strengths, weaknesses and residual risks, including specificity and attribution of evidence, target-to-result discipline, correction and learning, customer verification and transferability to ON-X.
- (c) No arithmetic total, average or conversion is used. The competitive-range determination will document for each bidder strengths, weaknesses and perceived risks and will apply the stated order of importance.

10. Clarification and Factual Validation

- (a) The Purchaser may seek clarification of an ambiguity, verify an existing fact, contact a reference customer, reconcile Appendix D and Appendix E, or consider reliable information

as permitted by the GBI. A clarification may explain or confirm evidence already present; it cannot constitute a substantive change of the already submitted bid.

- (b) Where information conflicts, the Purchaser will consider the source's basis of knowledge, the specificity and contemporaneity of the information, the materiality of the conflict and any corroboration. The resulting finding will be reflected in the relevant assessment.

11. Step 1 Result

- (a) After approval of the competitive-range determination, the Purchaser will notify each Bidder of its Step 1 result in accordance with the GBI. Admission to the competitive range is not an award, commitment or entitlement to award. Detailed Step 2 instructions and criteria will be issued to the ranged Bidders by RFP amendment. Any debriefing will be conducted in accordance with the GBI and applicable procurement rules.

END OF SECTION 4

ANNEX A **Appendices**

1. Appendix A: Administration

Prime Accountability and Reference-Lock Joint Statement for Step 1

2. Appendix B: Questions and Answers Form

The Questions and Answers form is provided separately as an Excel Workbook and is used for any communication between Purchaser and Bidders regarding the RFP

3. ~~Appendix C: Bidding Sheet~~

~~The Bidding Sheet and instructions are provided separately as an Excel Workbook at step 2.~~

4. Appendix D: Corporate Experience Reference Form

The Corporate Experience Reference (CER) form is provided separately as a fillable PDF form.

5. Appendix E: Customer Validation Form

The Customer Validation Form (CVF) is provided separately as a Word document.