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[SOLICITATION NUMBER]

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[PROJECT TITLE]

[PROJECT SERIAL N°]

[Guidance to CO. Please delete once you have addressed the requisite paragraph(s): (usually obtained from the authorization document e.g. Decision Sheet (DS) or Decision Document (DDoC))]

Book I

PROJECT-SPECIFIC BIDDING INSTRUCTIONS

FOR

NCIA SOLICITATIONS

UNDER THE NATO COMPETITIVE PROCUREMENT METHOD

BEST VALUE

[Pick Classification]

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[Guidance to CO. Please delete once you have addressed the requisite paragraph(s):

First tailor this Book I template to your needs. Return to the Table of Contents (TOC), select all (CTRL + A) and press F9 to update all fields. Select "update entire table" to ensure your TOC is updated as well and click OK. Use the search function to look for "error!" to ensure there are no erroneous cross references]

[Guidance to CO. Please delete once you have addressed the requisite paragraph(s): Each procurement is unique, and this default template may not fully address the specific needs of your project. If you find that adjustments are required, please contact the [Joint Center of Expertise \(JCoE\)](#) for advice on alternative approaches. **Additional tools or templates may be available upon request** (e.g.: a Requirements Traceability Matrix (RTM) for procurements involving mature products with high market readiness or other specialized scenarios). The JCoE can help identify and provide the most suitable resources to support your procurement goals.]

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 [Solicitation Number], 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](#).

2. Scope of Work

- (a) [Pick purpose single requirement or IDIQ]
- (b) The scope and requirements of the Contract are defined in the Schedule of Supplies and Services and the Statement of Work (SOW).
- (c) The SOW, set out in Book II, Part IV, including its annexes, contains the complete technical specifications and detailed requirements of the project.

3. Overview of the Prospective Contract

- (a) The successful Bidder shall perform the Work in accordance with Book II, Part IV (Statement of Work (SOW)), including its annexes, and shall deliver all items in accordance with Book II, Part I (Schedule of Supplies and Services (SSS)).
- (b) 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.
- (c) 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)).

(d) Applicable NCIA Contract Terms and Conditions

(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	Select One
2	GTC - Equipment	Select One
3	GTC - Commercial Off-The-Shelf (COTS) Software or Licenses	Select One
4	GTC - Software Developed for North Atlantic Treaty Organization (NATO) Purposes	Select One
5	GTC - Cloud Services	Select One
6	GTC - Artificial Intelligence (AI) Systems or AI-Enabled Services	Select One

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) Select one

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) [Choose for NU NR NS]

(b) Planned Contract

[Select applicable security classification for contract]

6. Bidders Conference and Site Visit

- (a) [Choose Bidders Conference yes or no]

- (b) [Choose Site Visit yes or no]

- (c) 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*.

[Pick Classification]

[Solicitation Number]

Book I – Project-Specific Bidding Instructions
Section 1

END OF SECTION 1

[Pick Classification]

SECTION 2. GENERAL BIDDING INFORMATION

1. Solicitation Details

	Topic:	Details:	General Bidding Instructions Reference:
1.	Declaration of Eligibility Required	[Select one]	SECTION 1.4(b)
2.	Evaluation Method	[Select best value type]	SECTION 1.5
3.	Contract Type	[Select contract type]	SECTION 3.7(c)(8)
4.	Contract Period of Performance	Base Period: [enter #] month(s) Option Period(s): [enter #] 12-month period(s)	n/a
5.	Solicitation Point of Contact (PoC)	[CO Name, Title]	SECTION 2.7
6.	Bidding Email Address	XXXXXX@ncia.nato.int <i>[Guidance to CO. Please delete once you have addressed the requisite paragraph(s): insert the functional mailbox address specifically created for the solicitation. Only use the Solicitation number (IFB/RFQ/RFP reference) and leave out other additions (e.g. "bids"). Inserting CO email address should (as much as possible) be avoided. Also verify the hyperlink of the email address once filled in and update when necessary.])</i>	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 <i>[Guidance to CO. Please delete once you have addressed the requisite paragraph(s): Modify the above paragraph to only include the relevant participating nations for this specific procurement]</i>	SECTION 1.4, SECTION 2.1(a)(8)
8.	Bid Validity Period	[Select one]	SECTION 2.15
9.	Multiple Schedules	[Select one]	SECTION 3.1(c), SECTION 4.1(a)

	Topic:	Details:	General Bidding Instructions Reference:
10.	Alternate Items	[Select one]	SECTION 3.2
11.	Competitive Dialogue or Negotiation	[Select one]	SECTION 2.14(b)
12.	Technical Bid Submission Format	[Select one]	SECTION 2.11
13.	Anticipated Effective Start Date of Contract (ESD)	[Select one] [Guidance to CO. Please delete once you have addressed the requisite paragraph(s): By default, the ESD should either occur ON the contract signature date, or within 30 calendar days thereafter. Only in exceptional circumstances can the ESD occur within 60 or 90 calendar days following contract signature date, for which the CO has to provide a proper justification.]	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 [Click to enter a date (min. 35 calendar days from solicitation issuance date (20 in case of AOM))], **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) [Pick yes or no]

6. Competitive Dialogue or Negotiation

(a) [Pick yes or no]

END OF SECTION 2

SECTION 3. BID PREPARATION INSTRUCTIONS

1. File Naming Convention

#	Bidding Volume:	Naming Convention:
1	Volume 1 – Administration	[Solicitation Number]–Company Name–Vol 1–Admin
2	Volume 2 – Technical	[Solicitation Number]–Company Name–Vol 2–Tech
3	Volume 3 – Corporate Experience	[Solicitation Number]–Company Name–Vol 3–CE
4	Volume 4 – Price	[Solicitation Number]–Company Name–Vol 4–Price

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.

(1) Volume 1: Administration

#	Item	Quantity and Format	Included in Bid (✓ / N/A)
1	Appendix A.1: Certificate of Legal Name of Bidder	1 (merged) PDF with all Appendices listed in this table	
2	Appendix A.2: Acknowledgement of Receipt of Solicitations Amendments		
3	Appendix A.3: Certificate of Independent Bid Determination		
4	Appendix A.4: List of Prospective Subcontractors/Consortium Members		
5	[Add optional Appendix 5 (Export Control) from this dropdown, or select not applicable]		
6	[Add optional Appendix 6 (Key Personnel) from this dropdown, or select not applicable]		
7	[Add optional Appendix 7 (Background IPR) from this dropdown, or select not applicable]		
8	[Add optional Appendix 8 (Supply Chain) from this dropdown, or select not applicable]		

Table 4: Administration Volume Bidder's Checklist

(2) Volume 2: Technical

[Guidance to CO. Please delete once addressed:]

- Technical Approach is an example of a Level-2 technical evaluation criteria. Management Approach is provided as optional Level-2 technical evaluation criteria. The criteria must be coordinated with the JCoE and be based on the type and risk of the procurement. There must be **no more than two (2) Level 2 technical evaluation criteria**. In addition, there must be **no more than five (5) Level 3 evaluation criteria**. Paragraphs may not be further refined into lower level sub-criteria (i.e. lower than Level 3 (e.g. Level 4 etc)).
- The Technical Approach and Management Approach (if applicable) sections contain the **suggested language**. These paragraphs can be tailored to each project.
- Note that, for any **bid submission and presentation format** that includes an “oral” component

(i.e.: oral presentation (virtual) and/or technical demonstration), COs are required to coordinate with the JCoE to ensure the appropriate language is and incorporated into this Book I.

- The bid page limit combined Technical Approach and Management Approach (if applicable) should not exceed sixty (60) pages for any project.]

#	Item	Bid Submission & Presentation Format	Quantity and Format	Maximum Page Limit	Solicitation Reference	Included in Bid (✓ / N/A)
1	Table of Contents	Written Only	1 PDF file	2	General Bidding Instructions Section 3.5.(d)	
2	Technical Approach	IAW item 12 in Table 2	1 PDF file	0	SECTION 3.2(a)(2)(i)	
3	[Management Approach]	IAW item 12 in Table 2	1 PDF file	0	SECTION 3.2(a)(2)(ii)	
4	Executive Summary (optional)	Written Only	1 PDF file	2	General Bidding Instructions Section 3.5(c)	
Total Maximum Page Limit for Volume 2				0		

Table 5: Technical Volume Bidder's Checklist

(i) Technical Approach (Level 2 Sub-Criteria)

- (A) The Bidder shall provide a clear and comprehensive description of its technical approach for meeting the requirements of the solicitation. The submission shall demonstrate the Bidder's understanding of the objectives, scope, and deliverables, and the ability to successfully perform the work.

(1) Technical Approach (Level 3 Sub-Criteria)

(i) Understanding of the operational requirement and constraints: The extent to which the bid demonstrates a clear understanding of the operational context, key dependencies, constraints, and challenges inherent in the requirement.

(ii) Credibility of the proposed delivery approach: The extent to which the proposed solution presents a clear, structured, and credible path to delivering the required outputs, including how activities, deliverables, and milestones are logically sequenced.

(iii) Ability to achieve required outcomes and performance levels: The extent to which the proposed approach is capable of achieving the intended outcomes, performance standards, and acceptance criteria set out in the solicitation.

(iv) Management of technical dependencies and interfaces: The extent to which the proposal identifies and addresses dependencies (e.g., external systems, stakeholders, data, or approvals) and demonstrates how interfaces will be managed to avoid disruption.

(v) Practicality and usability of the proposed solution: The extent to which the proposed solution is workable in practice, including considerations such as implementation, transition, operability, and maintainability.

- (ii) [Add if Management Approach is included as a criteria, otherwise delete this paragraph. Other custom criteria to be included in coordination with the JCoE.]

(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(a)(3)	
2	Corporate Experience Questionnaire (CPQ)	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(a)(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 at least one (1), but no more than 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 SOW and the desired experience listed in [SECTION 3.2\(a\)\(3\)\(v\)\(A\)](#).
 - (C) Submit referenced work that has occurred within at least the past six (6) years of bid submission, with a performance duration of at least six (6) months, to be considered recent and, therefore, fit for evaluation.
- (iii) The Bidder shall cite at least one (1) reference of experience for which the Bidder, whether as a prime contractor or a subcontractor, has delivered the same as, or substantially similar to, this solicited requirements.
 - (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.
- (iv) Each CER will address recency and relevancy evaluation factors as described in SECTION 4.7 of the *General Bidding Instructions*.
- (v) The Bidder shall specify which portion of each referenced experience is relevant to the solicited requirements (i.e.: CER Section 2) in relation to the following aspects:
 - (A) [\[Add relevant experience\]](#)
- (vi) In addition to the completion and submission of the CER form, the Bidder shall forward the Contractor Performance Questionnaire (CPQ) to their referenced points of contact (POCs) associated with each submitted Corporate Experience Reference (CER) for completion and direct submission to the Purchaser. The CPQ must correspond to and be completed for the same contract and scope of work as the submitted CER. CPQs submitted for contracts, projects, or efforts other than those identified in the corresponding CER may not be considered.
- (vii) 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.

(viii) It is the responsibility of the Bidder to ensure that their reference(s) submits the CPQ assessment to the Purchaser on time.

(ix) The Bidder shall not complete any section of the CPQ, except Section I as highlighted in the CPQ.

(x) Per the CPQ cover letter, referenced Points of Contact (POCs) will be directed to complete and forward CPQ forms directly to the Purchaser, by the BCD.

(xi) The CPQ shall be sent, from the Bidder's referenced POC, to the Bidding Email Address specified in [Table 2](#) of [SECTION 2.1](#).

(xii) 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 CPQ is submitted for respective bids.

(4) Volume 4: Price

#	Item	Quantity and Format	Solicitation Reference	Included in Bid (✓ / N/A)
1	Bidding Sheet	1 completed Microsoft Excel file	General Bidding Instructions SECTION 3.7	
2	Offer Summary (i.e. Tab 1 of the Bidding Sheet)	1 PDF file		

Table 7: Price Volume Bidder's Checklist

END OF SECTION 3

SECTION 4. BID EVALUATION AND CONTRACT AWARD

1. General

- (a) The bid shall be evaluated in accordance with the five (5) Best Value evaluation steps outlined in SECTIONS 4.5 through 4.9 of the *General Bidding Instructions*.

(1) **Step 1:** Administrative Compliance Evaluation

(2) **Step 2:** Technical Evaluation

(3) **Step 3:** Corporate Experience Evaluation

(4) **Step 4:** Price Evaluation

(5) **Step 5:** Determination of Apparent Successful Bidder

2. Administrative Compliance Evaluation

- (a) The Purchaser will evaluate the Bidder's Administration Volume in accordance with SECTION 4.5 of the *General Bidding Instructions*.

3. Technical Evaluation

- (a) In addition to SECTION 4.6(a) of the *General Bidding Instructions*, the Purchaser will evaluate the Bidder's Technical Volume as follows.

(1) [Pick between numerical or adjectival evaluation approach.]

4. Corporate Experience Evaluation

- (a) The Purchaser will evaluate the Bidder's Corporate Experience Volume in accordance with SECTION 4.7(a) of the *General Bidding Instructions*.

5. Price Evaluation

- (a) The Purchaser will evaluate the Bidder's Price Volume in accordance with SECTION 4.8 of the *General Bidding Instructions*.

6. Determination of Apparent Successful Bidder for Contract Award

- (a) The determination of apparent successful Bidder for contract award is in accordance with SECTION 4.9 of the *General Bidding Instructions*.

END OF SECTION 4

ANNEX A Appendices

1. **Appendix A: Administrative Certificates**

This prescribed administrative forms and certificates are provided separately as a fillable PDF form.

2. **Appendix B: Questions and Answers Form**

The Questions and Answers form is provided separately as an Excel Workbook.

3. **Appendix C: Bidding Sheet**

The Bidding Sheet and instructions are provided separately as an Excel Workbook.

4. **Appendix D: Corporate Experience Reference Form**

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

5. **Appendix E: Corporate Performance Questionnaire**

The Corporate Performance Questionnaire (CPQ) is provided separately as a Word document.