Secretary of the Air Force Concepts Development and Management (SAF/CDM),

Office of Commercial and Economic Analysis (OCEA)

Commercial Solutions Opening (CSO)

FA7146-20-S-C001

for

Commercial and Economic Research and Innovation (CERI)

I. CSO DESCRIPTION / OBJECTIVES.

A. Federal Agency Name. Secretary of the Air Force Concepts Development and Management (SAF/CDM), Office of Commercial and Economic Analysis (OCEA)

Commercial Solutions Opening (CSO) Summary	
Title	OCEA Commercial and Economic Research and Innovation (CERI)
Type	Open Two-Step CSO with Calls
Number	FA7146-20-S-C001
Open Period	Initiation to 1 September 2025 (for receipt of White Papers)
Ordering Period	Initiation to 30 September 2025 (for awards)

B. Schedule.

1. Open Period. The CSO Open Period will be from initiation until 1 September 2025. This is the period during which Contractors may submit White Papers.

2. Ordering Period. The Government may make awards throughout the Ordering Period. Efforts awarded prior to 30 September 2025 may include performance that continues beyond the end of the Ordering Period.

3. The Period of Performance for individual awards will be addressed in each Invitation to Propose (ItP) and may vary depending on the complexity of the effort/requirement. The ItP is a document inviting companies to provide the Government with Cost and Technical/Management information, as applicable to the requirement. Each ItP will specify the terms and conditions of the commodity or service sought.

C. Background. SAF/CDM OCEA, located in the National Capitol Region, is an Air Force-led, multi-service innovation office established to preserve Air Force and Department of Defense (DoD) military advantage from commercial and economic risks. This CSO applies to three core competencies of OCEA:

1. Studying the current conditions and emerging trends in portfolios of global commercial market sectors to identify commercial and economic risk to military advantage, and offer risk mitigations that span the authorities of the Executive Branch;

2. Advancing strategic research, cutting-edge macro-economic analyses, and studying United States (U.S.) and foreign industrial policies to illuminate the root causes that drive commercial and economic risk into the Air Force and DoD; and

3. Maintaining modern information technology solutions that apply data science innovations to premier commercial and economic data sets to rapidly turn data into information and insight.

D. Authority. This CSO is initiated under the Defense Commercial Solutions Offering Pilot Program (Defense Acquisition Regulation Supplement Tracking Number: 2018-O0016), as authorized by Section 879 of the National Defense Authorization Act for Fiscal Year 2017 (Pub. L. 114-328). Its authority has transitioned from NDAA FY2017 guidance to DFARS Subpart 212.70 Defense Commercial Solutions Opening.

E. Purpose. The purpose of this CSO is to allow for competitive selection of innovative commercial items, technologies, and services to obtain solutions or new capabilities that fulfill requirements, close capability gaps, or provide potential technological advancements in meeting the OCEA's Objectives.

F. Objective. The objective of this effort is to support OCEA's mission of preserving U.S. Air Force and DoD persistent needs by innovating with creative commercial partners. OCEA is soliciting White Papers with alternative approaches/solutions that provide one or any combination of the following:

1. Access to:

    a. Innovative technologies for compiling, assessing and managing commercially-available data

    b. Specialized proprietary data

    c. Market research

2. Cutting edge commercial or proprietary tools and methodologies that provide in-depth analysis for understanding conditions that drive commercial and economic risk for the Air Force and DoD

3. Innovative analyses that illuminate:

    a. Trends in macro-economics, trade, foreign direct investment, or capital flows

    b. The tactics, techniques or procedures other nations use to gain relative commercial advantage

    c. Domestic or foreign industrial strategies, policies, and standards development

G. Focus Areas. This effort features two Focus Areas under which Objectives may be applied:

1. Portfolio Management. This focus area is to create opportunities for the Government and commercial businesses to create a partnership that brings forth innovative ideas to analyze global markets, highlighting areas affecting the Defense industry. OCEA desires novel and alternative approaches to broad industry, technology, or sector assessments of special interest to the U.S. Government in order to inform decision makers on industrial base risk exposures and formulate responses to address these exposures across the whole of Government. Current technology areas of interest focus on Aviation, Space, Digital, Manufacturing, and Maritime. Technologies will continue to be added over the period of this CSO. Typical requirements for a particular focus area include, but are not limited to:

   a. Developing and providing industry value chain frameworks and their associated commercial ecosystems

   b. Defining, describing and forecasting the global market on the basis of product, application, end user, technology and region, including lateral and nontraditional markets

   c. Estimating and forecasting the global market size, in terms of value ($ Million)

   d. Identifying and analyzing the key growth drivers, restraints, challenges and opportunities that are influencing the global market, including identification of foundational and emerging technologies

   e. Assessing region-specific trends in North America, Europe, Asia Pacific, Rest of World (Latin America, the Middle East and Africa), which may include native-language analysis

   f. Developing and providing a value chain and sales channel analysis (tier-N supplier through consumer)

   g. Identifying and profiling key strategic market players and analyzing their core competencies in each application on the market

   h. Tracking and analyzing recent market developments and competitive strategies in the global market such as partnerships, agreements; collaborations; mergers and acquisitions (including intellectual property acquisition); talent competition; governing, standard setting, and professional entities; and new product developments and expansions

   i. Conducting engineering assessment related to manufacturing materials, capital equipment, and processes, as well as technology critical components

2. Strategic Initiatives. The focus areas of this effort is to: provide alternative approaches to innovative analyses that illuminate activity within the global industrial base that may negatively impact the DoD and U.S. Air Force; and develop mitigation strategies and/or counter-strategies that minimize risk to the DoD and U.S. Air Force pursuit of advanced capabilities. This includes:

a. Trends in macro-economics, trade, investment, legal precedents or capital flows. Specifically:

i. Developing insight into the structure of U.S. economic relations with nations deemed competitors by the National Defense Strategy in terms of economic output, trade, and investment and other capital flows, intellectual property flows, human capital flows to develop views on which types of bilateral economic interactions are particularly susceptible to manipulation by competitor nation governments

ii. Monitoring macroeconomic and geo-economic developments central to Chinese or other foreign policy behavior and inform OCEA with regular updates

iii. Tracking, analyzing, and continuously assessing bilateral investment and other economic flows between the U.S. and nations deemed competitors by the National Defense Strategy, to include:

(a) Competitor presence in the U.S. economy but also U.S. presence in the economy of competitor nations

(b) Competitor presence in the other economies but also other nation presence in the economy of competitor nations

iv. Providing a process by which to understand, anticipate and react to potential “spillover” risks emerging from global exposure to the financial systems of nations deemed competitors by the National Defense Strategy

v. Developing frameworks to assess levels of foreign dependence and interdependence, and the susceptibility of any nation to foreign government influence and direction (e.g., economic capture)

vi. Developing a framework for understanding and anticipating changes in foreign industrial economies, mainly as those changes relate to defense and technology industries. In particular, applying private-sector best-practices to identifying foreign “gamechanger” companies that will disrupt defense and technology industries

b. The tactics, techniques or procedures other nations use to gain relative commercial advantage:

i. Research Strategies

(a) Research and assess legal strategies/constructs undertaken in support of economic statecraft activities that target key elements of the National Security Innovation Base

(b) Develop case studies based on research and analysis, interviews and expert working groups

(c) Assess the use of other trade, investment and technical policy tools and structures (e.g., government role in the economy and in particular industries and enterprises) in support of industrial policy and economic statecraft goals

ii. Overseas infrastructure investment, development financing and construction: Identify or assess projects with potential to:

(a) Limit market access for U.S. firms in the commercial ecosystems that enable the defense industrial base

(b) Underbid U.S. or western competitors in such a way as to impact the international competitiveness of firms in the commercial ecosystems that enable the defense industrial base

(c) Constrain the ability of U.S. or allied forces to operate effectively in a given region

iii. Research and development, science and technology, and other forms of collaboration with U.S. universities and other entities and institutions

c. Domestic or foreign industrial policies. Typical research requirements for industrial policies include, but are not limited to conducting research and analysis on designated topics with potential to impact the commercial ecosystems that enable the defense industrial base to include:

i. Sovereign industries, national champions or state owned entities

ii. Military-Civil Fusion

iii. Science and Technology Ecosystem

iv. Collaboration with U.S. universities and other entities and institutions involved in research and development, science and technology, and innovation

v. Support for development of pillar industries

vi. Associated venture capital or private equity activity

vii. Defense industrial mobilization

viii. Overseas infrastructure investment and development

ix. Financing and construction

x. Other topics as determined by OCEA

d. Recommendations on mitigation and counter-strategies designed to manage risk and minimize the impact of influences in the commercial and economic domains

II. STEPS. This CSO will follow a Two-Step process.

A. First Step – White Paper Submission.

1. White Paper Summary.

a. Contractors may submit White Papers at any time throughout the Open Period. Contractors are encouraged to submit White Papers meeting Objective(s) and Focus Area(s) described in Section I, paragraphs I.F. and I.G. Multiple White Papers may be submitted and all White Papers will be reviewed. The submission of marketing materials not germane to the Objective(s) and Focus Area(s) are discouraged.

b. Each White Paper must stand on its own merit.

c. Please do not include the following in a White Paper submittal:

i. Statements of Work or Performance Work Statements

ii. Any Proprietary Information without first coordinating with the Contracting Point of Contact (POC) listed in Section III.A.

d. The cost of preparing White Papers in response to this solicitation is NOT considered an allowable direct charge to any resultant contract or agreement.

2. White Paper Content / Format. Each White Paper will include a Cover Page, Technical/Management section and rough order of magnitude (ROM). Contractors shall submit each White Paper in an editable, readable, and virus-checked format via e-mail to the Contracting POC identified in Section III.A, and each Amendment and/or Call. White Papers will be formatted as follows:

a. Cover Page. The Cover Page will include:

i. CSO number, FA7146-20-S-0001

ii. Relevant Amendment number or Call number, as applicable

iii. Title

iv. Objective(s) and/or Focus Area(s) covered by the White Paper (see paragraphs I.D. and I.E. on pages 2-6 of this document)

v. Company:

(a) Name

(b) Business size

(c) Commercial and Government Entity (CAGE) number, if any

(d) Unique Entity Identifier (UEI) number, if any

(e) Contracting POC(s) with contact information

(f) Technical POC(s) with contact information

b. Document Classification. All White Papers submitted under this CSO are anticipated to be UNCLASSIFIED. If a White Paper is CLASSIFIED, contact the Contracting POC in Section III.A to ensure CLASSIFIED information is allowed and transmitted via the appropriate secure network. CLASSIFIED documents must contain:

i. Proper document markings

ii. Level at which company is cleared

iii. Contractor address and POC for handling / receiving CLASSIFIED

iv. Contractor's security POC name, address and contact information

c. Technical/Management.

i. Overall capabilities of company to execute proposed effort

ii. "Innovative" (any technology, process, or method, including research and development, that is new, or any application that is new as of the submission date) approach to fulfill Objective(s) and Focus Area(s) specified on cover page or alterative areas for Government consideration

iii. How effort will be organized, subcontractors or organizations that will perform portions of the technical effort, how the efforts will be managed, and any other management or administrative information deemed appropriate

iv. Government property, equipment or facilities that may be required

v. Deliverables that may benefit the Government, if any

vi. Technical and/or management risk associated with innovative concept

d. Rough Order of Magnitude (ROM). A ROM is a top-level estimation of a project's level of effort and cost to complete. It should include major line items such as labor, special equipment, materials, etc. for effort.

e. Page Count. The suggested page count for White Papers is 10-35 pages.

3. White Paper Evaluation.

a. The Government will only evaluate information provided in the White Paper; no other sources of information will be considered.

b. Criteria. White Papers will be evaluated based on the following criteria, listed in order of importance:

i. Technical/Management. Potential to meet Government interests, as articulated in the Objective(s) and Focus Area(s) in Section I.F and I.G. See II.A.2.c above.

ii. Price/Affordability. Based on proposed ROM. See II.A.2.d above.

c. Ratings. White Papers will be categorized as Highly Recommended, Selectable, or Not Selectable in accordance with the definitions below.

Rating	Definition
Highly Recommended	Recommended for acceptance if sufficient funding is available. Does not require additional development. Can only be displaced by other Highly Recommended White Paper or Selectable White Paper that presents a unique approach that is more advantageous to the Government.
Selectable	Recommended for acceptance if sufficient funding is available, but at a lower priority than Highly Recommended White Papers. May require additional development. To ensure a diversity of approaches, a Selectable White Paper may be prioritized over a Highly Recommended White Paper if the Selectable White Paper presents a unique approach unlike any of those that were rated as Highly Recommended.
Not Selectable	Even if sufficient funding existed, the White Paper will not be funded.

d. Selection. The time required for the Government to evaluate White Papers will vary depending on the number of White Papers received, complexity and scope of submitted White Papers, and other mission needs. Contractors will be notified by the Contracting POC via an ItP (Second Step) if a White Paper is selected for further consideration.

B. Second Step - Invitation to Propose. White Papers evaluated as either Highly Recommended or Selectable may result in an ItP requiring more detailed Technical/Management and Price proposals, as applicable. The Contracting POC will officially issue an ItP to a Contractor. Proposals are not requested unless specifically notified via a Contracting POC-issued ItP.

1. The ItP will detail all the terms and conditions for the action, to include proposal submission instructions, as well as proposal due date and time.

2. Issuance of an ItP and receipt of a proposal in response is no guarantee of award.

3. A Contractor submitting a proposal without first submitting a White Paper will not be considered or eligible for award.

4. While multiple White Papers may be permitted, Contractors may only submit one proposal in response to an ItP.

5. Evaluation criteria will be specified in the ItP.

6. ItPs will address all or some of the following, as applicable:

   a. Anticipated Award Date and period of performance

   b. Security. Each ItP will specify the effort's Security Classification. The Government does not anticipate CLASSIFIED work at this time. ItPs for efforts requiring any level of CLASSIFIED work will specify the personnel, facility and/or storage clearance requirements.

   c. Deliverables. Deliverables are anticipated under this CSO and may include data items, software, hardware, prototypes, etc. Each ItP will identify each applicable Deliverable and expectations for delivery, timing, recipients, etc.

   d. Government Furnished Property. Government furnished property is not anticipated; however, any such property will be specified in the applicable ItP.

   e. Government Furnished Information. Government furnished information is anticipated and will be identified in applicable ItPs.

   f. Base/Network Support/Access. While the Government anticipates that the majority of work will be performed at Contractor or other non-Government facilities, some efforts, by their nature, may require access to DoD installations and/or networks. There are specific, detailed rules governing access to DoD installations and networks, which will be provided in all applicable ItPs.

g. Cost Sharing. Cost sharing is not required; however, if the resulting award is an OT Agreement (OTA), cost sharing may be required. Details will be specified in applicable ItPs.

7. Award. The Air Force anticipates funding multiple agreements during the Open Period of this CSO, under the Federal Acquisition Regulation (FAR) and/or Other Transaction Authority (OTA), as specified in each ItP.

a. Receipt of a proposal in no way guarantees an award. The Air Force reserves the right to award no agreements or any number of agreements for all, part, or none of the proposal(s) submitted based on the company's ability to perform desired work and funding availability.

b. Only Government COs and Agreement Officers (AO) (for OTAs) are legally authorized to contractually bind or otherwise obligate the Government.

III. CSO STRUCTURE/EXPECTATIONS.

A. General.

1. All White Papers/Proposals shall be submitted in accordance with this CSO.

2. White Papers and Proposals must be submitted only to Contracting POC and OCEA Program Office listed below, or as specified within each Amendment or Call.

Jennifer M Villarreal
Procuring Contracting Officer
jennifer.villarreal.4@us.af.mil

OCEA Program Office
saf.aa.cdm.cdmc.ocea.cso@us.af.mil

3. The Government intends to review all White Papers/Proposals and reserves the right to award some, all, part, or none of a Contractor's proposal content.

4. Contractors are advised that the submittal of a White Paper or Proposal is not a promise or guarantee of award.

5. Contractors are reminded that only Government COs and AOs are legally authorized to contractually bind or otherwise obligate the Government.

6. Open Period Amendments. The Government may issue Amendments to this CSO during the Open Period to change or correct content, as needed, and/or add, remove, or clarify Objective(s) and/or Focus Area(s).

7. Calls. Calls are instances during the Open Period where the Government may request targeted White Papers for a specific Objective, Focus Area, and/or capability. Each Call will contain pertinent information related to the effort and may include 'Pitch Days' or other mechanisms to interface with the Government. White Papers submitted in response to a Call will be accepted and evaluated as detailed within the individual Call. While the Government does not intend to pay for White Papers submitted under Step 1, select Calls may provide for funding on a case-by-case basis.

B. Eligibility Information.

1. Eligible Contractors. This CSO is a full and open acquisition. White Papers will be considered from all interested vendors, including small businesses as defined in the Small Business Act (15 U.S. Code §638) and non-traditional contractors as defined in 10 U.S. Code §2302(9).

2. Foreign Participation.

   a. Foreign-owned firms (entities organized or existing under the laws of a country other than the U.S.) are asked to immediately notify the Contracting POC listed in Section III.A before deciding to respond to this solicitation. Foreign contractors should be aware that restrictions might apply which could preclude participation.

   b. Foreign Nationals will be limited to Public Domain information unless the Contractor has the proper License or Technical Assistance Agreement (TAA) authorizing disclosure of Classified Military Information and/or Controlled Unclassified Information to foreign entities in accordance with the Department of State's International Traffic in Arms (https://www.pmddtc.state.gov/ddtc_public) or the Department of Commerce's Export Administration Regulations (https://www.bis.doc.gov/index.php/regulations/export-administration-regulations-ear).

C. Postings. All Amendments and Calls will be issued through Federal Business Opportunities at http://www.fbo.gov. Additional mediums may be utilized to maximize exposure of the CSO to all facets of industry. Contractors should monitor original sources for Amendments or Calls issued during the Open Period.

D. Communication.

1. Open dialogue is encouraged to reach the best technical solutions in response to this CSO. Dialogue between interested entities and the Government may be facilitated by contacting the Contracting POC listed in Section III.A. However, it should be noted that dialogue between the Government and any interested company does not constitute a commitment by the Government to fund any

proposed effort.

2. All communications should be UNCLASSIFIED and submitted via email to the Contracting POC listed in this CSO, or any Amendment or Call. Do not email CLASSIFIED information. For CLASSIFIED submissions, contact the Contracting POC in Section III.A to ensure CLASSIFIED information is allowed and transmitted via the appropriate secure network.

3. Discussions with any Government POC does not constitute a commitment by the Government to subsequently fund or award any proposed effort. Only COs/AOs are legally authorized to obligate the Government.

4. Proposals will only be requested by a Contracting POC. After receipt of proposals, all communication will be conducted by the Contracting POC listed in Section III.A (or listed in any Amendment or Call) and no other Government representatives.

5. Communication parameters will be further specified, as required, in Amendments, Calls and/or ItPs.

E. Non-Government Access to White Paper or Proposal Information. The Government employs Advisory and Assistance Services (A&AS) contractors. The A&AS contractors may have access to submitted information, as appropriate, during the duration of this CSO. These companies currently include:

Gemini Industries, Inc.
200 Summit Dr., Suite 110
Burlington, MA 01803
www.gemini-ind.com
Task Orders FA714622FB013 & FA714624F0028 under the General Services Administration One Acquisition for Integrated Services Multiple Award Indefinite Delivery/Indefinite Quantity, Small Business Pool 1 [GS00Q14OADS118]

The MITRE Corporation
(Federally Funded Research and Development Center)
7525 Colshire Dr.
McLean, VA 22102
https://www.mitre.org
Task Order FA7146-24-F-0040 under contract TIRNO-99-D-00005