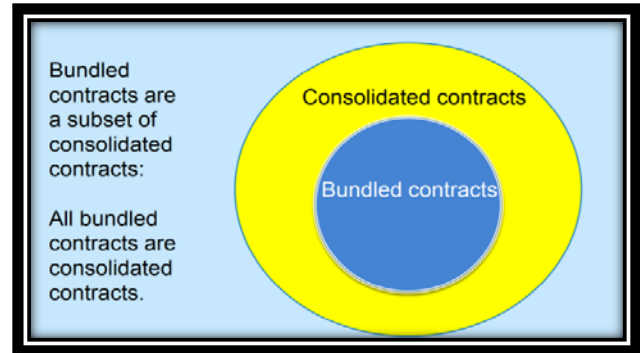


Contract bundling is a subset of **contract consolidation** which effectively precludes participation by small business because small businesses cannot perform the requirements of the contract.

Substantial bundling is any bundling that results in a contract or order with an estimated value of \$8M or more for the DoD.



Acquisition Planning Steps:

1. A **written assessment/determination** must be included that considers the impact of the consolidation or bundling that might affect a small business's participation.
2. **Cost-benefit analysis** must also be reviewed to determine the **possible impact on bundling** on small businesses and **any substantial benefits** that may be accrued by the Government where the benefits of bundling are **deemed necessary and justified**.
3. The overall **Written Determination** will determine that the bundling is appropriate if the following is answered affirmatively:
 - a. Is bundling necessary and justified?
 - b. Are there benefits that relate to cost savings and price reduction?
 - c. Are these benefits measurably substantial?
 - d. Is the bundling critical to the agency's mission success and the acquisition strategy provides for maximum practicable participation by small business concerns?

Annual Bundling Reporting Requirements: data to be provided to DoD OSBP

15 U.S.C. Section 644(p)(4)(B) requires the SBA to submit an annual report on contract bundling to Congress. After collecting the following information from each DoD Component, DoD OSBP provides a summary report to SBA on behalf of the entire DoD. Ensure all bundling justification files include:

1. data on the number, NAICS, and total dollar amount of all contract requirements that were bundled, including names of small businesses affected, if available;
2. the justification for the bundling of contract requirements;
3. the cost savings realized by bundling the contract requirements over the life of the contract;
4. the extent to which maintaining the bundled status of contract requirements is projected to result in continued cost savings;
5. the extent to which the bundling of contract requirements complied with the contracting agency's small business subcontracting plan, including the total dollar value awarded to small business concerns as subcontractors and the total dollar value previously awarded to small business concerns as prime contractors; and
6. the impact of the bundling of contract requirements on small business concerns unable to compete as prime contractors for the consolidated requirements and on the industries of such small business concerns, including a description of any changes to the proportion of any such industry that is composed of small business concerns.