



Department of Defense INSTRUCTION

NUMBER 4500.43

May 18, 2011

Incorporating Change 3, August 31, 2018

USD(A&S)

SUBJECT: Operational Support Airlift (OSA)

References: See Enclosure 1

1. PURPOSE. This Instruction reissues DoD Directive (DoDD) 4500.43 (Reference (a)) as a DoD Instruction (DoDI) in accordance with the authority in DoDD 5134.01 (Reference (b)) to:

- a. Establish policy, assign responsibilities, and provide procedures for the use of OSA aircraft.
- b. Supplement the guidance for use of OSA aircraft in DoDD 4500.56 (Reference (c)), DoDD 4500.09E (Reference (d)) and the policy in Office of Management and Budget (OMB) Circular A-126 (Reference (e)).
- c. Assist the DoD Components in developing guidance and procedures for the use of OSA aircraft.
- d. Revises the OSA requirements validation criteria.
- e. Tasks the Commander, U.S. Transportation Command (CDRUSTRANSCOM) with the responsibility to establish and implement a DoD-wide OSA common movement management system.

2. APPLICABILITY. This Instruction:

- a. Applies to OSD, the Military Departments, the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the Department of Defense, the Defense Agencies, the DoD Field Activities, and all other organizational entities within the Department of Defense (hereafter referred to collectively as the "DoD Components").
- b. Does NOT apply to:
 - (1) Aircraft assigned to Marine Helicopter Squadron-1 and aircraft assigned to the 89th Airlift Wing in support of Presidential airlift missions.

(2) The Army and Air National Guards when operating assigned OSA assets using State funds in State active duty status.

3. DEFINITIONS. See Glossary.

4. POLICY. It is DoD policy that:

a. In accordance with Reference (c):

(1) Government aircraft travel is a premium mode of travel involving high costs and limited resources. Commanders at all levels and airlift authorizing officials shall restrict OSA travel based on the considerations in this Instruction and Reference (c), and shall make every effort to minimize Government aircraft cost to satisfy the mission requirement.

(2) Travel status, distinguished visitor (DV) code or status, grade, or rank alone is not sufficient to justify the use of Government aircraft or to dictate a particular aircraft type. Approved travel may require aircraft capable of satisfying performance, configuration, and communications requirements to meet the specific mission needs.

b. OSA aircraft may be used to support the travel requirements in Reference (c).

c. OSA aircraft shall be assigned and managed to maximize wartime readiness, efficiency, cost-effectiveness, and peacetime utilization. OSA aircraft shall be maximized to provide both general- and direct-support mission capabilities across the Military Departments and Combatant Commands.

d. Inventory levels of OSA aircraft shall be based on joint wartime readiness requirements, transportation of DoD required use travelers, and the requirements outlined in Enclosure 4. The DoD Components shall dispose of aircraft in excess of these requirements.

e. Categories of travel shall be based on the guidance in References (c), (e), and DoDI 4515.13 (Reference (f)).

f. Government aircraft shall only be used for:

(1) Official travel as set forth in this in Instruction and References (c) and (e).

(2) OSA mission travel in accordance with Reference (c) to meet OSA mission requirements, as defined in the Glossary, when:

(a) No commercial airlift is able to meet the traveler's departure or arrival requirements within a 24-hour period, unless the traveler demonstrates that extraordinary circumstances require a shorter period to fulfill effectively the agency requirement; or

(b) The actual cost of using a Government aircraft is not more than the cost of using commercial airlift.

(3) Unofficial travel for designated required-use travelers or other travelers approved for unofficial travel in accordance with Reference (c).

(4) Travel on a space-available basis in accordance with References (c) and (f).

g. OSA aircraft shall not be used to provide permanent change of station transportation for DoD personnel, their dependents, or their household goods.


5. RESPONSIBILITIES. See Enclosure 2.

6. PROCEDURES. Procedures for OSA requests, priority and urgency codes, and cost management are described in Enclosure 3.

7. RELEASABILITY. **Cleared for public release.** This Instruction is available on the Directives Division Website at <http://www.esd.whs.mil/DD/>.

8. SUMMARY OF CHANGE 3. This change reassigns the office of primary responsibility for this Instruction to the Under Secretary of Defense for Acquisition and Sustainment in accordance with the July 13, 2018 Deputy Secretary of Defense Memorandum (Reference (g)).

9. EFFECTIVE DATE. This Instruction is effective May 18, 2011.


Ashton B. Carter PD, ACTING
Under Secretary of Defense for
Acquisition, Technology and Logistics

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ENCLOSURE 1

REFERENCES

- (a) DoD Directive 4500.43, "Operational Support Airlift (OSA)," October 28, 1996 (hereby cancelled)
- (b) DoD Directive 5134.01, "Under Secretary of Defense for Acquisition, Technology and Logistics (USD(AT&L)), " December 9, 2005, as amended
- (c) DoD Directive 4500.56, "DoD Policy on the Use of Government Aircraft and Air Travel," April 14, 2009, as amended
- (d) DoD Directive 4500.09E, "Transportation and Traffic Management," September 11, 2007
- (e) Office of Management and Budget Circular No. A-126, "Improving the Management and Use of Government Aircraft," May 22, 1992
- (f) DoD Instruction 4515.13, "Air Transportation Eligibility," January 22, 2016, as amended
- (g) Deputy Secretary of Defense Memorandum, "Establishment of the Office of the Under Secretary of Defense for Research and Engineering and the Office of the Under Secretary of Defense for Acquisition and Sustainment," July 13, 2018
- (h) DoD Directive 4515.12, "DoD Support for Travel of Members and Employees of Congress," January 15, 2010
- (i) DoD Instruction 5010.40, "Managers' Internal Control Program Procedures," May 30, 2013
- (j) Force Allocation Decision Model, current edition¹
- (k) DoD 7000.14-R, "DoD Financial Management Regulations (FMRs)," Volumes 1-15, current version
- (l) DoD Instruction 7250.13, "Use of Appropriated Funds for Official Representation Purposes," June 30, 2009
- (m) Sections 162, 2350, 2401, 3013(b), 5013(b) and 8013(b) of title 10, United States Code
- (n) DoD Directive 5158.04, "United States Transportation Command (USTRANSCOM)," July 27, 2007, as amended
- (o) DoD Directive 2010.9, "Acquisition and Cross-Servicing Agreements," April 28, 2003, as amended
- (p) Office of Management and Budget and Department of the Treasury Guidelines, "Joint OMB and Treasury Guidelines to the DoD Covering Lease or Charter Arrangements for Aircraft or Naval Vessels," October 31, 1984²
- (q) DoD Instruction 4000.19, "Support Agreements," April 25, 2013
- (r) Section 40125 of title 49, United States Code
- (s) Sections 109(b) and 502(f) of title 32, United States Code
- (t) Under Secretary of Defense (Comptroller)/Chief Financial Officer, Department of Defense Memorandum, "Campaign to Cut Waste Implementation Guidance," February 7, 2012
- (u) DoD Directive 3025.18, "Defense Support of Civil Authorities (DSCA)," December 29, 2010, as amended
- (v) Section 1535 of title 31, United States Code
- (w) DoD Instruction 3020.41, "Operational Contract Support (OCS)," December 20, 2011, as amended

¹ Copies are available through the Office of the Deputy Assistant Secretary of Defense for Plans in the Office of the Under Secretary of Defense for Policy. Distribution is limited.

² Available at: http://www.acq.osd.mil/log/tp/tp_library.htm

ENCLOSURE 2

RESPONSIBILITIES

1. UNDER SECRETARY OF DEFENSE FOR ACQUISITION, TECHNOLOGY AND LOGISTICS (USD(AT&L)). The USD(AT&L), in addition to the responsibilities in section 5 of this enclosure, shall:

a. Provide the DoD Components with policy guidance on the acquisition and use of OSA aircraft pursuant to Reference (c).

b. Coordinate on all proposals for the long-term lease or charter of executive aircraft to supplement the OSA fleet prior to submission to Congress.

2. DoD CHIEF INFORMATION OFFICER (DoD CIO). The DoD CIO, in addition to the responsibilities in section 5 of this enclosure, shall:

a. In coordination with the Chairman of the Joint Chiefs of Staff, provide recommendations for command, control, and communications (C3) capabilities provided by OSA aircraft to the Secretary of Defense for approval.

b. In coordination with the National Leadership Command Capability Executive Management Board, identify C3 equipment, personnel, and training requirements for supporting senior leaders traveling on OSA aircraft.

3. ASSISTANT SECRETARY OF DEFENSE FOR LEGISLATIVE AFFAIRS (ASD(LA)). The ASD(LA), in addition to the responsibilities in section 5 of this enclosure, shall approve congressional travelers pursuant to Reference (c) and DoDD 4515.12 (Reference (h)) and coordinate aircraft scheduling requirements in accordance with Reference (c) with the Executive Aircraft Scheduling Activity (EASA) or CDRUSTRANSCOM, as appropriate.

4. EXECUTIVE SECRETARY OF THE DEPARTMENT OF DEFENSE (DoD ExecSec). The DoD ExecSec, shall:

a. Approve travel on OSA aircraft in accordance with the guidance in References (c) and (e), for:

(1) Government officials of other executive departments or agencies.

(2) Foreign nationals and members of their official party as invited by the Secretary of Defense or designee.

(3) Official travel of senior DoD officials, Defense Agency officials, and family members of senior DoD officials of OSD, the Defense Agencies, and activities administratively supported by OSD.

b. When applicable, coordinate aircraft scheduling requirements with the EASA, United States Transportation Command (USTRANSCOM), and other DoD Components.

c. Approve special travel requirements for the use of OSA to include requirements for secure communications.

5. HEADS OF DoD COMPONENTS. The Heads of DoD Components shall establish internal management control procedures to ensure Component compliance with the standards in this Instruction, Reference (c), and DoDI 5010.40 (Reference (i)).

6. SECRETARIES OF THE MILITARY DEPARTMENTS. The Secretaries of the Military Departments, in addition to the responsibilities in section 5 of this enclosure, shall:

a. Designate validation offices for headquarters staffs and subordinate commands for travel on Government aircraft.

b. Establish a process for approval of travel on OSA aircraft for personnel assigned to their respective Departments.

c. Maintain and provide visibility to the CDRUSTRANSCOM of assigned and allocated OSA assets.

d. Provide a single point of contact to coordinate joint wartime readiness requirements with the Combatant Commanders (CCDRs) and the Joint Staff.

e. Annually provide the Chairman of the Joint Chiefs of Staff with OSA requirements, as outlined in Enclosure 4. These include joint wartime readiness requirements, including requirements for OSA aircraft used to support steady-state campaigns, contingency operations, and posture planning efforts as outlined in the Force Allocation Decision Model (Reference (j)). In developing their requirements, identify the minimum number of aircraft, crews, security clearances, equipment, including mission communications systems, and training requirements necessary to meet them.

f. Budget for the costs of operating their OSA aircraft and assign and manage OSA aircraft as required to maximize wartime readiness, efficiency, cost-effectiveness, and peacetime utilization. Budgetary documents shall be prepared in accordance with DoD 7000.14-R

(Reference (k)).

g. Invite and approve travel for members and employees of Congress in accordance with Reference (h), foreign officials and accompanying party invited to travel at the expense of their respective Military Departments in accordance with Reference (f) and DoDI 7250.13 (Reference (l)).

h. Notify the geographic CCDRs of all Military Department OSA missions that transit the CCDRs' respective areas of responsibility.

i. Employ a common movement management system to enable the sharing of OSA capacity across the DoD Components.

j. Collect and maintain the information described in Enclosure 3 on the use of OSA aircraft and provide the information to the CDRUSTRANSCOM in accordance with Reference (c).

k. Provide the CDRUSTRANSCOM with an annual report that provides operating cost data for each type of OSA aircraft.

l. Determine, in accordance with section 2401 of title 10, United States Code (U.S.C.) (Reference (m)), when supplementing the OSA fleet with commercial aircraft through long-term lease or charter is required; provide a copy of the determination for long-term lease or contract to the USD(AT&L) for coordination and provide the approved requirement to USTRANSCOM.

m. Ensure OSA requirements are fully captured in contingency plans or applicable documentation, as required by joint strategic capabilities planning guidance.

n. In conjunction with the CDRUSTRANSCOM, through the Chairman of the Joint Chiefs of Staff, support the establishment of a common movement management system that provides enterprise-wide visibility and standardized metrics for all DoD OSA aircraft.

7. SECRETARY OF THE AIR FORCE. In addition to the responsibilities in sections 5 and 6 of this enclosure, the Secretary of the Air Force shall schedule special airlift mission aircraft and Presidential support aircraft in accordance with Reference (c).

8. CHAIRMAN OF THE JOINT CHIEFS OF STAFF. The Chairman of the Joint Chiefs of Staff, in addition to the responsibilities in section 5 of this enclosure, shall:

a. Provide to the Secretary of Defense, in coordination with the Secretaries of the Military Departments, Chief, National Guard Bureau (NGB), and CCDRs, an annual validation that assesses DoD OSA requirements and the current OSA inventory in accordance with Reference (e).

b. In coordination with the DoD CIO, provide recommendations for C3 capabilities provided

by OSA aircraft to the Secretary of Defense for approval.

c. Plan and budget for readiness exercises of OSA wartime requirements.

d. Require each CCDR to designate a single validation office for processing OSA transportation requests.

e. Establish a validation and approval process for OSA transportation requests for personnel assigned to the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff.

f. Invite and approve travel for foreign officials and accompanying party invited to travel at the expense of the Department of Defense in accordance with Reference (l).

g. Coordinate with the Secretaries of the Military Departments, Chief NGB, and CCDRs on the establishment of a common movement management system that provides enterprise-wide visibility and standardized metrics for all OSA aircraft.

9. CCDRs. The CCDRs, in addition to the responsibilities in section 5 of this enclosure, shall:

a. In accordance with Reference (c), provide oversight of theater-assigned or allocated assets.

b. Collect and maintain the information described in Enclosure 3 on the use of OSA aircraft and provide the information to the CDRUSTRANSCOM in accordance with Reference (c).

c. Maintain and provide visibility of all assigned and allocated OSA aircraft.

d. Establish a process for approval of travel on OSA aircraft for personnel assigned to their respective Combatant Commands.

e. Annually provide the Chairman of the Joint Chiefs of Staff with OSA requirements, as outlined in Enclosure 4. These include joint wartime readiness requirements, including requirements for OSA aircraft used to support steady-state campaigns, contingency operations, and posture planning efforts as outlined in Reference (j). In developing their requirements, identify the minimum number of aircraft, crews, security clearances, equipment, including mission communications systems, and training requirements necessary to meet them.

f. Notify the geographic CCDRs of all Combatant Command OSA missions that transit their respective areas of responsibility.

g. Invite and approve travel for foreign officials and accompanying party invited to travel at the expense of the Combatant Command in accordance with Reference (l), if applicable.

h. Employ a common movement management system pursuant to Reference (c) to enable the sharing of OSA across the DoD Components.

i. Budget for the costs of their OSA aircraft and assign and manage OSA aircraft as required to maximize wartime readiness, efficiency, cost-effectiveness and peacetime utilization. Budgetary documents shall be prepared in accordance with Reference (k).

j. Determine, in accordance with Reference (m), when supplementing the OSA fleet with commercial aircraft through long-term lease or charter is required; provide a copy of the determination for lease or contract to the USD(AT&L) for coordination and the approved requirement to USTRANSCOM.

10. CDRUSTRANSCOM. The CDRUSTRANSCOM, in addition to the responsibilities in sections 5 and 9 of this enclosure, shall:

a. Operate the Joint Operational Support Airlift Center in accordance with DoDD 5158.04 (Reference (n)) and schedule all OSA missions within the continental United States (CONUS), except for missions:

(1) Conducted exclusively for aircrew training that prevent the carrying of passengers or cargo.

(2) Conducted for maintenance requirements that prevent the carrying of passengers or cargo.

(3) Scheduled by EASA.

(4) Using exempt, withheld, or Service Secretary-controlled aircraft in accordance with Reference (c). (See Glossary for definition of "Service Secretary-controlled aircraft.")

b. Upon request, schedule airlift requested under cooperative military airlift and acquisition and cross-servicing agreements in accordance with DoDD 2010.9 (Reference (o)).

c. Collect and maintain the information described in Enclosure 3 on the use of OSA aircraft for submission to the General Services Administration.

d. Make recommendations to the Chairman of the Joint Chiefs of Staff regarding sourcing for Combatant Command OSA requirements.

e. Schedule OSA or common-user aircraft to cover shortfalls for missions approved and scheduled in accordance with Enclosure 3.

f. In collaboration with the USD(AT&L), Chairman of the Joint Chiefs of Staff, Secretaries of the Military Departments, CCDRs, and Chief, NGB, establish and implement a common movement management system, leveraging existing systems to the maximum extent practicable, that provides enterprise-wide visibility, standardized metrics and reporting capabilities for all DoD OSA aircraft.

g. Serve as the DoD focal point for OSA visibility and data reporting.

h. Provide an annual assessment to the Chairman of the Joint Chiefs of Staff in compliance with visibility requirements contained in Enclosure 4 and other criteria established by the Chairman.

i. Maintain data collection systems to satisfy the requirements of References (c) and (e).

j. Schedule OSA aircraft in support of United States Northern Command (USNORTHCOM), within the USNORTHCOM area of responsibility.

11. CHIEF, EASA. The Chief, EASA, shall coordinate with the DoD ExecSec and the ASD(LA) to provide airlift in accordance with established priorities.

ENCLOSURE 3

PROCEDURES FOR OSA REQUESTS, PRIORITY AND URGENCY CODES,
AND COST MANAGEMENT

1. GENERAL

a. Commanders at all levels and airlift authorizing officials shall:

(1) Restrict OSA travel based on considerations such as the purpose of the trip and priority of the travel required; the availability of commercial airline or aircraft (including charter) service; whether the use of Government aircraft would be more cost-effective than commercial aircraft or other method of transportation required; and whether highly unusual circumstances present a clear and present danger or an emergency exists that requires the use of Government aircraft.

(2) Base the type of aircraft used on minimum cost and size necessary to satisfy the mission requirement.

(3) Not schedule training missions when the principal purpose is to accommodate the travel of DoD officials.

b. Requests for transportation that may be satisfied by OSA aircraft shall be submitted through a standardized request format as prescribed by the scheduling activity. Submission of requests by electronic means is encouraged. All requests shall be signed by the senior traveler, authorized in accordance with paragraph 4.e. of Reference (c), reviewed by the airlift validator designated by the DoD Component, then submitted to the appropriate scheduling agency by the airlift validator. All requests must include a commercial cost estimate, except for travelers outlined in Reference (c) and paragraph 2.a. of this Enclosure 3, and a full justification for the use of military airlift, and shall be maintained for a minimum of 3 years by the requesting official and validator.

c. Except when operational demands dictate otherwise, requesters shall provide the scheduling activity with sufficient advance notice of flight requests (at least 4 days) and sufficient flexibility in departure times (at least 2 hours) to permit efficient employment of aircraft. The carrying of space-available passengers and cargo authorized by Reference (f) is strongly encouraged and will be accommodated to the maximum extent possible.

d. DoD required-use travelers identified in Reference (c) will be supported for their air transportation requirements. Other DoD senior officials and DoD-approved senior officials identified in Reference (c) will be supported to the maximum extent possible. The provisions of References (c) and (f) apply to all OSA airlift missions.

e. The inventory of all executive aircraft required by Reference (c) shall be based on the requirements of the Combatant Commands and the Military Departments, as outlined in

Enclosure 4, and approved by the Secretary of Defense. The DoD Components shall dispose of those aircraft in excess of the joint readiness requirements.

2. REQUESTS FOR USE OF OSA AIRCRAFT. A written or digitally signed request is required for travel on OSA aircraft. The DoD Component that schedules or operates the aircraft may prescribe the request format required to satisfy documentation and reporting requirements. All requests must be signed by the senior DoD traveling official certifying use of the aircraft. This signature authority may not be delegated. However, signed requests are not required for DoD-approved senior officials with documentation from the DoD ExecSec or the ASD(LA) validating the travel request. The amount of information provided by the requester may vary depending on the category of authorized use.

a. Requests from required-use travelers identified in Reference (c) shall include:

- (1) Name(s) and title(s) (or grade or rank) of all travelers.
- (2) Purpose of travel.
- (3) Itinerary, including required departure or arrival times.

b. Requests for transportation of individuals, other than those listed in paragraph 2.a., shall be submitted on a case-by-case basis and shall include:

- (1) Names and titles (or grade or rank) of all travelers.
- (2) Military Department or agency of all travelers.
- (3) Purpose of travel.
- (4) Itinerary, including required departure or arrival times, and an explanation as to why scheduling requirements cannot be changed to permit the use of commercial air.
- (5) Justification to include a statement of commercial air costs.
- (6) A statement that the travel policy requirements of this Instruction have been met.
- (7) Signature of the senior traveling official and appropriate authorizing official. The signature authority may not be delegated.

c. Requests from any traveler that include travel on DoD aircraft for unofficial travel must include:

- (1) Amount required to be reimbursed to the Government, with an airline reservation printout reflecting the full coach fare attached.

(2) A statement of intent to reimburse the Government for the full coach fare. Payment shall be made by attaching to the travel voucher a personal check payable to the Treasurer of the United States and a travel office printout showing the full coach fare and a DD Form 1131, "Cash Collection Voucher" (available at <http://www.dtic.mil/whs/directives/infomgt/forms/formsprogram.htm>).

d. Travelers accompanying a DoD official on Government aircraft, including family members or other invited guests, shall reimburse the Government for any unofficial travel at the full coach fare, as set forth in References (c) and (e). The DoD senior official shall attach to the travel voucher a personal check made payable to the Treasurer of the United States and shall include a travel office printout that reflects the full coach fare and a completed DD Form 1131.

3. PRIORITY AND URGENCY CODES. The DoD Components shall use these priority and urgency codes when requesting OSA aircraft missions:

a. Priority Codes

(1) Priority 1. Airlift in direct support of operational forces engaged in combat, contingency, or peacekeeping or humanitarian operations directed by the National Command Authorities or for emergency lifesaving purposes.

(2) Priority 2. Required-use airlift requests or airlift requests with compelling operational considerations making commercial transportation unacceptable. Considerations for making commercial transportation unacceptable may include time or delivery constraints, team travel restrictions, or security requirements. Missions cannot be satisfied by any other mode of travel.

(3) Priority 3. Official business airlift validated to be more cost-effective than commercial air travel when supported by OSA aircraft, or official business travel when consolidated with another request(s) on previously scheduled missions.

b. Urgency Codes. These codes are used within the framework of the priority codes and relate to the amount of time allowable between identification of the requirement and execution of the flight.

(1) Urgency 1: Combat. Airlift of personnel or materiel in direct support of forces alerted for or engaged in combat or contingency operations.

(2) Urgency 2: Lifesaving or Operational. Airlift of personnel or materiel in direct support of lifesaving operations or operational forces deployed or preparing for mobilization.

(3) Urgency 3: Humanitarian. Airlift of personnel or materiel in direct support of authorized and urgent humanitarian operations.

(4) Urgency 4: Critical. Airlift of personnel or materiel that, while not fulfilling a higher urgency, would critically impact the outcome of unit requirements if not immediately supported exactly as requested.

(5) Urgency 5: Priority. Airlift of personnel or materiel that, while not fulfilling a higher urgency, would have a serious impact on the outcome of unit requirements if not fulfilled. Changes or consolidation of these requests with other requests would not adversely affect unit requirements.

(6) Urgency 6: Routine. Airlift of personnel or materiel scheduled as part of an organization's daily or weekly routine, or travel that is qualified on a cost-effective basis but does not meet the requirements of a higher urgency code. Changes or consolidation of these requests with other requests would not affect unit requirements.

4. COST-EFFECTIVENESS

a. The Military Departments shall, on an annual basis or as requested by and in a format defined by USTRANSCOM, provide USTRANSCOM with a report that provides operating cost data for each type of OSA aircraft. USTRANSCOM and the Combatant Commands, with cooperation from each DoD Component, shall develop procedures that allow a cost comparison between OSA and commercial air travel. Cost-effectiveness procedures or methodology shall include these basic principles:

(1) For determining military aircraft cost:

(a) Acquisition cost, military pay and allowances, civilian pay, and training costs (directly associated with aircrew training; e.g., emergency procedures training, which excludes the ability to carry passengers and cargo) shall not be included in determining the hourly cost comparison rate since these costs are required to maintain military readiness and a wartime capability.

(b) The aircraft operating cost per flying hour for OSA aircraft missions shall include petroleum, oil, and lubrication costs; unit intermediate and depot-level maintenance, including civilian and contract maintenance labor; spares; and crew per diem costs.

(c) Cost comparisons shall consider applicable military aircraft flying-hour rates for positioning and repositioning flight legs.

(2) For determining commercial air travel cost:

(a) The cost of commercial air travel at the available Government contract rate shall be used, or the full coach fare if a Government contract does not exist or is not applicable.

(b) Any associated increased costs such as rental cars, lodging and other costs outlined in Reference (e) shall be included, as appropriate.

(c) Only the costs associated with passengers traveling on official business shall be included.

(3) Cost-effectiveness may be expressed in terms of a break-even dollar value or the number of seats to be filled by official duty passengers on each mission.

b. For official travel to meet mission requirements involving the DoD senior officials and required-use travelers identified in Reference (c), secondary use of the aircraft for other official travelers to conduct DoD business is presumed to result in cost savings and requires no cost comparisons.

5. COMMERCIAL AIRCRAFT

a. Long-term lease or charter of commercial aircraft to supplement the OSA fleet shall be conducted by USTRANSCOM.

b. Supplementing the OSA aircraft fleet with commercial aircraft through lease, contract, charter, or any procurement technique is only authorized when:

(1) A determination has been made, in accordance with section 2401 of Reference (m), by the Secretary of the Military Department or the CCDR that such service is essential to the accomplishment of the mission and is the most cost-effective method of satisfying the requirement.

(2) Notification of intent to procure aircraft for such purpose has been given to the USD(AT&L) in accordance with section 2401 of Reference (m) and OMB and Department of the Treasury guidelines (Reference (p)).

6. REIMBURSEMENT

a. DoDI 4000.19 (Reference (q)) prescribes DoD guidance for interservice reimbursement. Interservice support for OSA is reimbursable only when the user causes the operator to incur an additional unbudgeted (incremental) cost.

b. OSA airlift provided to a foreign entity pursuant to a cooperative military airlift agreement; an acquisition and cross-servicing agreement in accordance with Reference (o) (or comparable agreement); or in accordance with section 2350 of Reference (m) is reimbursable to the unit providing the airlift.

7. DATA COLLECTION REQUIREMENTS. Agencies with aircraft subject to OSA reporting requirements shall maintain data collection systems and processes in compliance with References (c) and (e) for OSA aircraft operations. This information shall be collected and provided to USTRANSCOM in accordance with Reference (c):

- a. Justification for using DoD aircraft instead of commercial aircraft or for using one type of DoD aircraft instead of another.
- b. Recovery of costs to operate DoD OSA aircraft.
- c. Aircraft operating cost per flying hour.
- d. Cost comparisons required by Reference (e) to justify the use of Government aircraft instead of commercial aircraft services. Cost comparison tables shall be updated annually.

8. NATIONAL GUARD USE OF OSA

- a. National Guard personnel assigned activities to carry out functions of the Secretary of a Military Department in accordance with section 162(a)(2) of Reference (m), and when operating aircraft outside the continental United States (OCONUS), must comply with section 40125 of title 49, U.S.C., (Reference (r)) and be under Federal control. This will also ensure status of forces agreement protections for aircrews. Operations conducted in accordance with sections 109(b) and 502(f) of title 32, U.S.C., (Reference (s)) within Alaska, Hawaii, and U.S. territorial waters, or in international waters between possessions and CONUS, are not restricted.
- b. When on active duty, National Guard units shall be assigned to and under the control of the CCDRs in accordance with References (i) and (m). The CCDRs have command authority of all assets of those units gained by their Commands.
- c. When operating in accordance with sections 3013(b), 5013(b), or 8013(b) of Reference (m), National Guard units shall coordinate the use of OSA aircraft with the geographic Combatant Command for OCONUS missions, or with USTRANSCOM for missions in CONUS.

ENCLOSURE 4

AIRCRAFT REVIEW, VALIDATION, AND ENTERPRISE VISIBILITY REQUIREMENTS

1. REVIEW AND VALIDATION REQUIREMENTS. In accordance with Reference (e), DoD is required to conduct validations of its OSA aircraft inventory and requirements to determine sufficiency of the fleet. The procedures in this enclosure align DoD's OSA asset validation process with References (c) and (e), while maintaining diligent oversight in accordance with Under Secretary of Defense (Comptroller)/Chief Financial Officer, Department of Defense Memorandum (Reference (t)).

2. PROCEDURES. The Chairman of the Joint Chiefs of Staff will conduct an annual OSA aircraft review and provide an assessment of fiscal year requirements and inventory to execute the national defense strategy to the Secretary of Defense by the end of each calendar year. The OSA fleet validation will be based on:

a. Wartime requirements of forces that are assigned to carry out functions of the Secretary of a Military Department, and that provide mission essential support as outlined in Reference (m).

(1) Specific contingency plans and concepts of operation sourcing.

(2) Contingency scenario-based requirements.

(3) Steady-state campaigns and posture planning efforts.

(4) General and direct support requirements.

b. DoD required use travelers in accordance with Reference (c).

c. Members of Congress.

d. Peacetime engagement and support requirements:

(1) Support to civil authorities in accordance with DoDD 3025.18 (Reference (u)).

(2) Phase 0 Engagement (non-plan specific).

3. ENTERPRISE VISIBILITY REQUIREMENTS. All DoD OSA aircraft, including executive and withheld aircraft, to the extent classification and operations security permit, will be visible in a common movement management system that enables effective oversight and fosters operational effectiveness and efficiency. The system allows OSA scheduling agencies the capability to monitor and assess airlift requirements, asset availability, and mission execution on

behalf of DoD. To ensure sufficient oversight and to promote efficient operations, the common movement management system will provide:

- a. Total asset visibility (TAV).
- b. In-transit visibility (ITV).
- c. Single user point access to standardized OSA enterprise data.
- d. Dashboard capability to customize, through specific searches and display options, the way in which information and metrics are presented to the user based on specific roles and permissions.
- e. Cross domain data security with the ability to provide data and operational security via interoperability between non-secure internet protocol router networks and the SECRET Internet Protocol Router Network domains.
- f. Validated airlift request handling to facilitate managing OSA requests by standardizing request processing, handling, routing, and archiving information in a data storage and retrieval system.

GLOSSARY

PART I. ABBREVIATIONS AND ACRONYMS

ASD(LA)	Assistant Secretary of Defense for Legislative Affairs
C3	command, control, and communications
CCDR	Combatant Commander
CDRUSTRANSCOM	Commander, United States Transportation Command
CONUS	continental United States
DoD CIO	DoD Chief Information Officer
DoD ExecSec	Executive Secretary of the Department of Defense
DoDD	DoD directive
DoDI	DoD instruction
DV	distinguished visitor
EASA	Executive Aircraft Scheduling Activity
ITV	in-transit visibility
NGB	National Guard Bureau
OCONUS	outside the continental United States
OMB	Office of Management and Budget
OSA	operational support airlift
TAV	total asset visibility
U.S.C.	United States Code
USD(AT&L)	Under Secretary of Defense for Acquisition, Technology, and Logistics
USTRANSCOM	United States Transportation Command

PART II. DEFINITIONS

Unless otherwise noted, these terms and their definitions are for the purposes of this Instruction:

authorizing official. The DoD official responsible for reviewing, authorizing, and approving DoD senior official travel requests. Authorizing officials are responsible to ensure the proper method of air transportation is used and approved travel is in compliance with References (c), (e) and (f) and DoD travel policies.

common-user aircraft. Passenger and cargo-capable organic aircraft (Reference (n)) providing transportation on a common basis for more than one DoD unit and, as authorized, non-DoD agencies. Common-user aircraft, excluding Service-unique or theater-assigned or -allocated aircraft, are under the combatant command authority of the CDRUSTRANSCOM.

direct support. A mission requiring a force to support another specific force and authorizing it to answer directly to the supported force's request for assistance. For the purpose of OSA missions, generally refers to those aircraft or missions scheduled by the Military Departments to support their forces and operations.

executive aircraft. A subset of the OSA fleet solely dedicated to the airlift of DoD and Federal senior officials and DoD-approved senior officials. These aircraft are specially configured to support travel when other aircraft do not provide the timeliness, security, communications and capability.

exempt aircraft. Defined in Reference (c).

general support. Support given to the supported force as a whole and not to any particular subdivision thereof. For the purpose of OSA missions, generally refers to those aircraft or missions made available for common-user or joint scheduling.

ITV. The ability to track the identity, status, and location of DoD cargo (excluding bulk petroleum, oils, and lubricants), and passengers from origin to consignee or destination across the range of military operations.

official travel to meet mission requirements. Mission requirements are activities that constitute the discharge of a DoD Component's official responsibility. Such activities include, but are not limited to, the transport of troops and equipment, training, evacuation (including medical evacuation), intelligence and counter-narcotics activities, search and rescue, transportation of prisoners, use of defense attaché-controlled aircraft, aeronautical research and space and science applications, and other such activities. Mission requirements do not include official travel to give speeches, attend conferences or meetings, or make routine site visits.

OSA aircraft. Those fixed-wing aircraft acquired or retained exclusively for OSA missions, as well as any other DoD-owned or -controlled aircraft, fixed or rotary wing, used primarily for OSA missions.

OSA mission. The movement of high-priority passengers and cargo with time, place, or mission-sensitive requirements. OSA missions are a special classification of airlift mission support to provide for the timely movement of limited numbers of priority personnel or cargo.

other official travelers. Personnel other than required users whose travel needs cannot reasonably be met by commercial airlines or aircraft due to travel requirements, security considerations, or dangers or emergencies, or when travel by military aircraft is proven to be more cost-effective than commercial aircraft travel. Other official travelers include:

DoD personnel other than senior DoD officials and DoD-approved senior officials.

Federal agency personnel traveling on official business exclusively for the Department of Defense and Federal agency personnel paying for their travel pursuant to section 1535 of title 31, U.S.C. (Reference (v)).

Personnel with funded invitational travel authorizations.

Contractors traveling pursuant to the provisions of Reference (f) or DoDI 3020.41 (Reference (w)), or who are otherwise authorized to use DoD aircraft.

Foreign personnel traveling pursuant to an acquisition and cross-servicing agreement or comparable agreement in accordance with References (f), (l), and (o).

Any non-DoD official approved for travel on DoD-owned or -controlled aircraft by the ASD(LA), the DoD ExecSec, Secretary of the Military Department, or Chairman of the Joint Chiefs of Staff.

phase 0 engagement. Joint and multinational operations inclusive of normal and routine military activities.

requester. The person submitting an OSA movement request. The signatory on the request must be the senior DoD traveler. The signature authority cannot be delegated.

Service Secretary-controlled aircraft. Aircraft designated by the Secretaries of the Military Departments for transportation of their senior Service officials in accordance with Reference (c). These aircraft are included in the inventory and reporting requirements for compliance with Reference (e), but are exempt from common-user scheduling to the extent the Secretary of the Military Department permits.

TAV. The capability to provide users with timely and accurate information on the location, movement, status, and identity of units, personnel, equipment, materiel, and supplies.

validation office. The designated office of a DoD Component responsible for validating and verifying, assigning priorities when necessary, and providing final review of the documented airlift request for submission to the appropriate agency for scheduling.

withheld aircraft. Defined in Reference (c).