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**SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION**

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

National Security Exception: The procurement related to this initiative is subject to National Security Exception and is, therefore, excluded from all of the obligations of the trade agreements.

Vendor/Firm Name and Address
Raison sociale et adresse du
fournisseur/de l'entrepreneur

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Title - Sujet Email Transformation Initiative	
Solicitation No. - N° de l'invitation 2B0KB-123327/B	Amendment No. - N° modif. 008
Client Reference No. - N° de référence du client 20123327	Date 2012-07-17
GETS Reference No. - N° de référence de SEAG PW-\$TSS-002-24571	
File No. - N° de dossier 002tss.2B0KB-123327	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2012-07-23	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Knowles, Jason	Buyer Id - Id de l'acheteur 002tss
Telephone No. - N° de téléphone (819) 956-1418 ()	FAX No. - N° de FAX (819) 956-5165
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
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Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

Solicitation No. - N° de l'invitation

2B0KB-123327/B

Amd. No. - N° de la modif.

008

Buyer ID - Id de l'acheteur

002tss

Client Ref. No. - N° de réf. du client

20123327

File No. - N° du dossier

002tss2B0KB-123327

CCC No./N° CCC - FMS No/ N° VME

This revision is issued to provide industry with information as discussed at the Request for Information (RFI) Workshop which took place on July 6, 2012.

Attached:

- Request for Information (RFI) Workshop Summary

There are no further changes to the information currently forming part of this RFI.



**Shared Services Canada
Transformation Office**

Unclassified

**Request for Information (RFI) Workshop Summary
Email Transformation Initiative**

**July 12, 2012
Version 1.2**

Document Change Control

Revision #	Date of Issue	Author(s)	Brief Description of Change(s)
1.2	2012-07-12	Tonya Shortill	Included Workshop number and Annex D
1.1	2012-07-09	Claude Bazinet	Document revision and QA
1.0	2012-07-09	Jason Pantalone	Initial Document

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Summary

Shared Services Canada (SSC) held the Email Transformation Initiative (ETI) Request for Information (RFI) Workshop on July 6, 2012 in the National Capital Region. In attendance were a total of 45 firms/associations, as well as 6 government departments, for a total of 152 attendees, with some joining via videoconference from Toronto and Calgary. A full listing of industry attendees is available in Annex D.

The RFI Industry Workshop was moderated by Valerie Wutti, DG Enterprise Portfolio and Program Management. She opened by explaining the rules of engagement for the session. Valerie then introduced Mme Liseanne Forand, President of Shared Services Canada, who welcomed the attendees and provided some information regarding new developments at Shared Services Canada.

Mme Forand announced that on Friday, June 29, 2012, the Shared Services Act was given royal assent. This act formally establishes SSC as a department through legislation, which provides SSC a governing council as well as authority pertaining to the services it delivers to its 43 partner departments and agencies. SSC was also given the authority to procure goods and services directly. Public Works and Government Services Canada (PWGSC) will no longer be conducting procurements on SSC's behalf. SSC's objectives continue to be to maintain business continuity, fairness, transparency and openness.

After the President's remarks, the RFI workshop panel presented the material which has been made available in Annex B. The session ended with an open forum and discussion, the results that can be found in Annex C.

Next Steps

A Request for Information (RFI) was posted on MERX on June 22, 2012 and will close on July 18, 2012. RFI one-on-one sessions are scheduled for July 27, 2012 to July 31, 2012 to assist the Email Transformation Initiative Team clarify vendor RFI responses.

Annex A - Agenda

Time	Description
10:00 – 10:15	Welcome, Introduction, Opening Remarks
10:15 – 12:00	Workshop Topics: Review, Discussion and Q&A
12:00 – 1:00	Lunch (not provided)
1:00 – 2:45	Workshop Topics: Review, Discussion and Q&A
2:45 – 3:00	Break
3:00 – 4:00	Workshop Topics: Review, Discussion and Q&A
4:00 – 4:45	Open Q&A
4:45 – 5:00	Recap and Closing Remarks

Event Moderator

- Valerie Wutti

Event Speaker

- Liseanne Forand, President, Shared Services Canada

Panel Members

- Benoît Long – Senior Assistant Deputy Minister, Transformation, Service Strategy and Design, Shared Services Canada
- Gail Eagen – Director General, Email Transformation Initiative, Shared Services Canada
- ETI Team Members:
 - Paul Joly, Director
 - Ed Shallow, Enterprise Architecture
 - Murat Cecen, Email Requirements Lead
- Yan Robichaud – Communications Security Establishment Canada (CSEC)

- Rose Spirito – Procurement

Annex B – Presentation



Shared Services
Canada

Services partagés
Canada

Canada

Annex C - Questions and Answers

Q1: User Segmentation

Regarding Secret vs. Enhanced clearance in the RFI, what is the difference between “Enhanced authentication” and “Strong authentication”? Do contractors fall under user segments?

Answer: Ed Shallow

The authentication level could assist in defining a user segment, however the context of the slide deck should not be taken as prescriptive. Contractors are treated in the basic categories.

Q2: User Segmentation

Regarding personnel classification, are your personnel segmented as classified and non-classified? Is there a requirement for all email to be encrypted or do only certain individuals need encryption?

Answer: Ed Shallow

This will depend on security safeguards and the posture selected for the threat population group. If additional security is required, that will be the case.

Answer: Gail Eagen

Currently some of the email is encrypted. With the new email service, the user would choose to encrypt depending on the correspondence being sent.

Answer: Benoît Long

SSC is not going in with a blanket encryption requirement.

Q3: User Segmentation

Can you clarify the classifications of Protected A, B and C information? Are the 15,000 users mentioned in the RFI supposed to be Protected C only?

Answer: Benoît Long

Currently, SSC estimates that there are 15,000 users that would require Secret email on a daily basis. This could be looked at for one layer of segmentation. However, SSC wants to make it clear that Secret email is likely for a small user base. SSC does not require secret email for

377,000 users. As mentioned, SSC's focus areas are value and costs, and as a result, SSC would be concerned if a secret solution was deployed to all users as this would likely be cost prohibitive.

Answer: Ed Shallow

The general idea is that there is a potential spectrum of service attributes that could be applied in an effort to reduce costs. Therefore, please suggest in your RFI responses how to utilize and manage user segmentation.

Q4: Service Delivery and Sourcing

When we read the RFI, and when you put an RFP together, it will be difficult for a contractor to figure out what software you are using. Can we take this infrastructure component out? There will be various spending on the hardware and software pieces therefore can we just take this out? Can SMEs bid on this at later stage?

Answer: Benoît Long

We had those questions at Industry Day on how to structure the architecture. SSC has not made a decision on this. We are looking to the industry to see what makes the most sense and to provide the best possible approach that will maximize value and cost efficiencies. We need to identify risks and harvest the benefits, and this is the reason why ETI is conducting a collaborative process. Nothing has been ruled out, as such, please propose your ideas in the RFI response.

Q5: Government Furnished Equipment (GFE)

Traditionally, crown assets have not been used for trade-in or trade-up. Can SSC transfer assets to the vendor? Traditionally we have been told that is cannot be done, what are the Treasury Board rules on this?

Answer: Rose Spirito

SSC is looking at various options and how this extends to commodities. There has been a number of ways that this has been done with industry in the past. We are looking at all viable positions and options for Canada to consider.

Q6: Government Furnished Equipment (GFE)

With new procurement, traditionally the Canadian government does not lease. Would SSC consider leasing at this time?

Answer: Rose Spirito

SSC is not entertaining anything at this juncture, however it is looking at other deployments that have happened in the past. SSC is open to all suggestions and all ideas will be taken under consideration.

Q7: Government Furnished Equipment (GFE)

Regarding the hardware inventory, is there an understanding of all the equipment that is 24 months or younger? Can SSC provide any available numbers?

Answer: Gail Eagen

The short answer is no, but by the time we complete the Request for Responses for Evaluation (RFRE) Phase, SSC should be able to provide more information. We just recently brought the 43 partner departments and agencies together therefore we are still getting all inventory and data up-to-date.

Answer: Benoît Long

Please share with SSC any insights you may have of what we should be asking.

Q8: Secret Email

In regards to the PKI infrastructure, I'm assuming the PKI infrastructure will be under SSC and not turned over to the vendor.

Answer: Ed Shallow

At this juncture this is a fair assumption.

Q9: Data Sovereignty

Will cloud applications need to reside in Canada as well? Would sovereignty be extended to the vendor data as well?

Answer: Benoît Long

SSC is only talking about data specific to GC and used in email, and data sovereignty is only extended to email data. I'm not sure how we could impose this on vendor data. If it has nothing to do with the email service, then I don't see why we would ask for that. We will take this away as a question.

Follow-up Answer: Rose Spirito

At this time, Canada has not indicated a requirement imposing that a vendor's data reside in Canada. However, Canada may impose security requirements on the vendor that will be subject to monitoring in order to ensure that the vendor is compliant and that GC data remains in Canada.

Q10: Data Sovereignty

Regarding policy, is there a policy through SSC that identifies your email as Secret or Classified?

Answer: Benoît Long

Email is treated like other records, so it would fall under and be governed by the TBS standards on information management.

Q11: Data Sovereignty

Thank you for the feedback, this helps identify the quality of the process in regards to email sovereignty, and this makes life easier for the vendor to manage.

Answer: Benoît Long

Within an Information management environment, it's important to have clear policies and to make everything as clear as possible. We need to make this information clearer, including disposition, and this will help in getting a successful solution. SSC has established an internal working group to work on this. We are also seeking assistance from TBS in this regard.

Q12: Security Requirements

Regarding section 13.6 of the RFI, How far does the vendor go in the supply chain for security clearance? How does the GC help the supplier mitigate risk?

Answer: Yan Robichaud

There is a separate session that will be organized to discuss the supply chain, and the session will help explain the requirement for supply chain clearance. From CSEC's perspective, it's analyzing information and equipment, therefore is a difficult topic to cover briefly in this session. Therefore, I would prefer if we leave this topic of discussion for the other session.

Q13: Identity Credential and Access Management (ICAM)

On the federation side, is the scope dealing with pure federation or an externalized federation management?

Answer: Ed Shallow

On-boarding options are meant to be a spectrum of possibilities. Assume to be within the service itself versus being externalized.

Answer: Gail Eagen

The diagram presented is only meant to be conceptual as it is there to stimulate some ideas and discussion. SSC does not have a definitive idea on what the solution should be. The dotted line in terms of responsibilities of SSC versus service provider can move, and SSC wants feedback on where the dotted line should be.

Q14: Single Sign-On (SSO)

SSO is a broad topic. Is SSC planning to define the scope of SSO? What categories will there be?

Answer: Ed Shallow

Scope and objective will include most of the target population, and all account holders to improve the ergonomics of the ICAM process.

Q15: Single Sign-On (SSO)

Regarding the applications for SSO, is it restrained to simply email and its directory, or will the SSC partner organizations need to leave behind their applications?

Answer: Ed Shallow

The scope will be made completely clear before the RFP. Currently this is a moving target and will be articulated before publishing the RFP.

Q16: Data Migration

With 3 petabytes of data, over 300,000+ users and a migration window from June 2013 to March 2015, what contingencies are in-place to meet these deadlines? Has SSC considered

migration windows during the day or other dependencies on delegates that SSC can share? Will this be part of the inventory or does it still need to be provided?

Answer: Paul Joly

Yes, SSC is looking at the different types of migration and the amount of data to be migrated to the new solution.

Answer: Benoît Long

The date is very important for moving departments to the new email system. And we need more information to find out what SSC needs to do to get there. For example what amount of data should be migrated once the new service is ready? We will consider different approaches and we are interested in finding out more information regarding large scale migrations, and how they were approached, and what the outcomes were for these migrations.

Q17: Data Migration

My question was not solely about the data as the providers giving you options need to understand the dependencies i.e. some department may only have 2 hours per day allocated to move mailbox data, or some data that cannot be moved. We can provide options, but only if the dependencies are known.

Answer: Gail Eagen

We don't know these things at the moment. We have 43 partner departments and agencies that have to keep things running. One stakeholder has already mentioned that they want things to be running all the time, and this summarizes the demanding environment we are operating in. We will need to take into account the individual potential timelines for migration. As an example, we know that CRA doesn't want migration during tax season. We will need to create a "Bus schedule" for migration, and this will be complex but necessary to keep business going while we migrate the data.

Answer: Benoît Long

SSC understands that there will be some overlap between the old and new system. How can we do this seamlessly? We know that there will be complications, so maybe we start with the simplest migrations possible. We are interested in a seamless, safe and simple user experience.

Q18: User Segmentation / Cost Savings

The RFI talks about segmentation up to protected B plus Secret. What is the openness for breaking out a solution from protected A and B?

Answer: Ed Shallow

The Crown is very open to exploring this kind of solution, if it achieves cost saving objectives.

Annex D – Industry Attendees

Accenture Canada
aTrust Inc.
Bell Canada
Buchanan Associates
CA Canada Company
Canadian Association of Defence and Security Industries
Canadian Information Technology Providers Association (CITPA)
Ceryx Inc
CFN Consultants
CGI
Cisco Systems Canada Co
Dell Canada Inc.
Deloitte Inc
EMC
Entrust Limited
Google Inc
GSI International Consulting Group
Hewlett-Packard (Canada) Co. (HP)
Hitachi Data Systems
IBM Canada Ltd
Informatica
Information Technology Association of Canada (ITAC)
Infosys Ltd.
Integra Networks Corp.
IT/NET Ottawa Inc. (is a subsidiary of KPMG)
Itergy International Inc.
Itex Inc.
Microsoft
Modis Canada Inc.
OnX Enterprise Solutions
PureLogic IT Solutions Inc.
Quest Software
Roaring Penguin Software
Scalar Decisions Inc
Softchoice Corporation
Symantec Corporation
TATA Consultancy Services
Tek Systems

TELUS Communications Company
TeraMach Technologies Inc.
Three O Project Solutions
Titus Inc.
Unisys Canada
ViON Corporation
Zylog Systems (Ottawa) Ltd