

**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:**

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**

11 Laurier St., / 11, rue Laurier

Place du Portage, Phase III

Core 0A1/Noyau 0A1

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government
Services Canada**

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition aux: Travaux Publics et Services
Gouvernementaux Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Comments - Commentaires

Title - Sujet Data Conversion of PDS bibliographi		
Solicitation No. - N° de l'invitation EP369-131548/A	Date 2013-07-22	
Client Reference No. - N° de référence du client EP369-131548		
GETS Reference No. - N° de référence de SEAG PW-\$\$EL-618-26276		
File No. - N° de dossier 618el.EP369-131548	CCC No./N° CCC - FMS No./N° VME	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-09-03		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: Brewster, Shannon		Buyer Id - Id de l'acheteur 618el
Telephone No. - N° de téléphone (819) 956-5879 ()	FAX No. - N° de FAX () -	
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA 5TH FL. 350 ALBERT ST OTTAWA Ontario K1A0S5 Canada		

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services - EL Division/Services
professionnels en informatique - division EL

4C2, Place du Portage

Gatineau

Québec

K1A 0S5

Delivery Required - Livraison exigée See Herein	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
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

EP369-131548/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

618e1

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

File No. - N° du dossier

CCC No./N° CCC - FMS No/ N° VME

EP369-131548

618e1EP369-131548

BID SOLICITATION

DATA CONVERSION

FOR

**PUBLISHING AND DEPOSITORY SERVICES (PDS) DIRECTORATE,
INTEGRATED SERVICES BRANCH,
PUBLIC WORKS AND GOVERNMENT SERVICES CANADA (PWGSC)**

TABLE OF CONTENTS

PART 1 – GENERAL INFORMATION

1.1 Introduction

1.2 Summary

1.3 Debriefings

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

2.2 Submission of Bids

2.3 Enquiries - Bid Solicitation

2.4 Applicable Laws

2.5 Improvement of Requirement During Solicitation Period

2.6 Basis for Canada's Ownership of Intellectual Property

2.7 Volumetric Data

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

3.2 Section I: Technical Bid

3.3 Section II: Financial Bid

3.4 Section III: Certifications

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

4.2 Technical Evaluation - Mandatory Technical Criteria

4.3 Financial Evaluation

4.4 Basis of Selection

PART 5 - CERTIFICATIONS

5.1 Certifications Precedent to Contract Award

5.2 Federal Contractor Program - Certification

5.3 Former Public Servant Certification

5.4 Code of Conduct Certifications - Certifications Required Precedent to Contract Award

PART 6 - RESULTING CONTRACT CLAUSES

6.1 Requirement

6.2 Minimum Work Guarantee

6.3 Standard Clauses and Conditions

6.4 Contract Period

6.5 Authorities

6.6 Payment

6.7 Invoicing Instructions

6.8 Certifications

6.9 Applicable Laws

6.10 Priority of Documents

6.11 Foreign Nationals (Canadian Contractor)

6.12 Foreign Nationals (Foreign Contractor)

6.13 Insurance Requirements

6.14 Limitation of Liability - Information Management/Information Technology**6.15 Joint Venture Contractor****6.16 Safeguarding Electronic Media****6.17 Representations and Warranties****6.18 Access to Canada's Property and Facilities****6.19 Termination for Convenience****List of Annexes to the Resulting Contract:**

Annex A Basis of Payment
Annex B Statement of Work
Appendix 1 to Annex B - Glossary
Appendix 2 to Annex B - Criteria for Date Conversion
Appendix 3 to Annex B - Data Elements
Appendix 4 to Annex B - Data Map Publications
Appendix 5 to Annex B - Data Record Sets (DRS)¹

Annex C Bid Evaluation Criteria

List of Attachments to Part 3 (Bid Preparation Instructions):

- Attachment 3.1: Bid Submission Form

PART 1- GENERAL INFORMATION

1.1 Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, if applicable, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided; and
- Part 6 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The annexes include the Basis of Payment, the Statement of Work, and the Evaluation Criteria. The attachments include the Bid Submission Form.

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of Public Works and Government Services Canada (the "**Client**") for the provisions of Data Conversion.
- (b) It is intended to result in the award of a contract for one year.
- (c) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the Agreement on Internal Trade (AIT), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA).

1.3 Debriefings

After contract award, Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days of receipt of the results of the bid solicitation process. The debriefing may be provided in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.
- (c) The 2003 (2012-11-19) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.

The text under Subsection 4 of Section 01 – Code of Conduct and Certifications of 2003 referenced above is replaced by:

Bidders should provide, with their bid or promptly thereafter, a complete list of names of all individuals who are currently directors of the Bidder. If such a list has not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to provide such a list within the required time frame will render the bid non-responsive. Bidders must always submit the list of directors before contract award.

Canada may, at any time, request that a Bidder provide properly completed and Signed Consent Forms (*Consent to a Criminal Record Verification form - PWGSC-TPSGC 229*) for any or all individuals named in the aforementioned list within a specified delay. Failure to provide such Consent Forms within the delay will result in the bid being declared non-responsive.

The text under Subsection 5 of Section 01 – Code of Conduct and Certifications of 2003 referenced above is replaced by:

The Bidder must diligently maintain the list up-to-date by informing Canada in writing of any change occurring during the validity period of the bid, and must also provide Canada, when requested, with the corresponding Consent Forms. The Bidder will also be required to diligently maintain the list and when requested, provide Consent Forms during the period of any contract arising from this bid solicitation.

- (d) Subsection 5(4) of 2003, Standard Instructions - Goods or Services - Competitive Requirements is amended as follows:
 - (i) Delete: sixty (60) days
 - (ii) Insert: one hundred and eight (180) days

2.2 Submission of Bids

- (a) Bids must be submitted only to Public Works and Government Services Canada Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.
- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile to Public Works and Government Services Canada will not be accepted.

2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than ten (10) calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a "proprietary" nature must be clearly marked "proprietary" at each relevant item. Items identified as proprietary will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

2.4 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Note to Bidders: A bidder may, at its discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of its bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of its choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder. Bidders are requested to indicate the Canadian province or territory they wish to apply to any resulting contract in their Bid Submission Form.

2.5 Improvement of Requirement During Solicitation Period

If bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reasons for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority in accordance with the article entitled "Enquiries - Bid Solicitation". Canada will have the right to accept or reject any or all suggestions.

2.6 Basis for Canada's Ownership of Intellectual Property

Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds:

- (i) Section 6: "Exceptions to Contractor Ownership" of the Treasury Board Secretariat - 6.4.1 the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

2.7 Volumetric Data

The bibliographic data in non-Machine Readable Cataloging (MARC) 21 format has been provided to Bidders to assist them in preparing their bids. The inclusion of this data in this bid solicitation does not represent a commitment by Canada that Canada's future usage of data conversion will be consistent with this data. It is provided purely for information purposes.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

- (a) **Copies of Bid:** Canada requests that bidders provide their bid in separately bound sections as follows:
- (i) Section I: Technical Bid (3 hard copies)
 - (ii) Section II: Financial Bid (1 hard copy)
 - (iii) Section III: Certifications (1 hard copy)
- Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.
- (b) **Format for Bid:** Canada requests that bidders follow the format instructions described below in the preparation of their bid:
- (i) use 8.5 x 11 inch (216 mm x 279 mm) paper;
 - (ii) use a numbering system that corresponds to the bid solicitation;
 - (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, Bidder's name and address and contact information of its representative; and
 - (iv) include a table of contents.
- (c) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, bidders are encouraged to:
- (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and
 - (ii) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.
- (d) **Submission of Only One Bid from a Bidding Group:**
- (i) The submission of more than one bid from members of the same bidding group is not permitted in response to this bid solicitation. If members of a bidding group participate in more than one bid, Canada will choose in its discretion which bid to consider.
 - (ii) For the purposes of this article, "**bidding group**" means all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another. Regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law, entities are considered "**related**" for the purposes of this bid solicitation if:
 - (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - (B) they are "related persons" or "affiliated persons" according to the *Canada Income Tax Act*;

- (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
- (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.

3.2 Section I: Technical Bid

- (a) In their technical bid, bidders must demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders must demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work. The technical bid must address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.
- (b) The technical bid consists of the following:
 - (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name, the Bidder's Procurement Business Number, the Bidder's status under the Federal Contractors Program for Employment Equity, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
 - (ii) **Substantiation of Technical Compliance Form:** The technical bid must substantiate the compliance with the specific articles of Annex "C", which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or product complies is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Annex "C", where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
 - (iii) **Customer Reference Contract Information:**
 - (A) The Bidder must provide customer references who must each confirm, if requested by PWGSC, the facts identified in the Bidder's proposal. For each customer reference, the Bidder must, at a minimum, provide the name and either the telephone number or e-mail address for a contact person. Bidders are also requested to include the title of the contact person.
 - (B) The form of question to be used to request confirmation from customer references is as follows:

[Sample Question to Customer Reference: "Has [the bidder] provided your organization with [describe the services and, if applicable, describe any required time frame within which those services must have been provided]?"

_____ Yes, the bidder has provided my organization with the services described above.

_____ No, the bidder has not provided my organization with the services described above.

_____ I am unwilling or unable to provide any information about the services described above.]

- (C) If there is a conflict between the information provided by the customer reference and the bid, the information provided by the customer reference will be evaluated instead of the information in the bid. If the named individual is unavailable when required during the evaluation period, the Bidder may provide the name and contact information of an alternate contact from the same customer.
- (D) Crown references will be accepted.

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Basis of Payment in Annex A. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive price quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option years. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (c) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No Bidder will be permitted to add or change a price as part of this confirmation. Any Bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

3.4 Section III: Certifications

Bidders must submit the certifications required under Part 5.

Solicitation No. - N° de l'invitation

EP369-131548/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

618e1

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

File No. - N° du dossier

CCC No./N° CCC - FMS No/ N° VME

EP369-131548

618e1EP369-131548

ATTACHMENT 3.1**BIDDER FORMS**

BID SUBMISSION FORM		
Bidder's full legal name		
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name	
	Title	
	Address	
	Telephone #	
	Fax #	
	Email	
Bidder's Procurement Business Number (PBN) [see the <i>Standard Instructions 2003</i>]		
Jurisdiction of Contract: Province in Canada the bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
Former Public Servants See the Article in Part 5 of the bid solicitation entitled Former Public Servant Certification for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____ If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"	
	Is the Bidder a FPS who received a lump sum payment under the terms of a work force reduction program? Yes ____ No ____ If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"	
Canadian Content Certification [For the definition of Canadian goods and services, consult the PWGSC SACC clause A3050T]	On behalf of the bidder, by signing below, I confirm that [check the box that applies]:	
	At least 80 percent of the bid price consists of Canadian goods and services (as defined in the solicitation)	
	Less than 80 percent of the bid price consists of Canadian goods and services (as defined in the solicitation)	

Federal Contractors Program for Employment Equity (FCP EE) Certification:	On behalf of the bidder, by signing below, I also confirm that the bidder <i>[check the box that applies]</i> :	
If the bidder is exempt, please indicate the basis for the exemption to the right. If the bidder does not fall within the exceptions enumerated to the right, the Program requirements do apply and the bidder is required either to:	(a) is not subject to Federal Contractors Program for Employment Equity (FCP-EE), because it has a workforce of less than 100 permanent full or part-time employees in Canada;	
	(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i> ;	
(a) submit to the Department of HRSD form LAB 1168, Certificate of Commitment to Implement Employment Equity, DULY SIGNED; or (b) submit a valid Certificate number confirming its adherence to the FCP-EE.	(c) is subject to the requirements of FCP-EE, because it has a workforce of 100 or more permanent full or part-time employees in Canada, but has not previously obtained a certificate number from the Department of Human Resources and Skills Development (HRSD) (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached; OR	
Bidders are requested to include their FCP EE Certification or signed LAB 1168 with their bid; if this information is not provided in the bid, it must be provided upon request by the Contracting Authority during evaluation.	(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).	
For joint ventures, be sure to provide this information for each of the members of the joint venture.		
Number of FTEs [Bidders are requested to indicate, the total number of full-time-equivalent positions that would be created and maintained by the bidder if it were awarded the Contract. This information is for information purposes only and will not be evaluated.]	On behalf of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that: 1. The bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation; 2. This bid is valid for the period requested in the bid solicitation; 3. All the information provided in the bid is complete, true and accurate; and 4. If the bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.	
Signature of Authorized Representative of Bidder		

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.
- (c) In addition to any other time periods established in the bid solicitation:
 - (i) **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
 - (ii) **Requests for Further Information:** If Canada requires additional information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
 - (A) verify any or all information provided by the Bidder in its bid;
 - (B) contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,

the Bidder must provide the information requested by Canada within 2 working days of a request by the Contracting Authority.
 - (iii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.2 Technical Evaluation

- (a) **Mandatory Technical Criteria:** Each bid will be reviewed to determine whether it meets the mandatory requirements of the bid solicitation. Any element of the bid solicitation identified with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified. The mandatory requirements are described in Annex C.
- (b) **Customer Reference Checks:**
 - (i) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders on the same day using the email address provided in the bid. Canada will not award any points unless the response is received within 5 working days of the date that Canada's email was sent.
 - (ii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact

person if the original contact person indicates that he or she is unwilling or unable to respond). The Bidder will have 24 hours to submit the name of a new contact. That contact will again be given 5 working days to respond once Canada sends its reference check request.

- (iii) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (iv) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if the reference customer is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.
- (v) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders who have not, at that point, been found non-responsive.

4.3 FINANCIAL EVALUATION

(a) Financial Calculation

- (i) A financial evaluation will be performed only on proposals that are technically responsive. A technically responsive proposal is a proposal that meets all mandatory criteria.
 - (A) The Financial Proposal will be evaluated by the PWGSC Contracting Authority, independently of the technical proposals.
 - (B) The price of proposals will be evaluated in Canadian dollars, Goods and Services Tax (GST) and Harmonized Sales Tax (HST) excluded, Customs duties and Excise taxes included.
- (ii) For the purpose of bid evaluation, the total evaluated price will be calculated in the Basis of Payment contained in Annex "A".

(b) Formulae in Pricing Tables

If the pricing tables provided to Bidders include any formulae, Canada may re-input the prices provided by Bidders into a fresh table, if Canada believes that the formulae may no longer be functioning properly in the version submitted by a Bidder.

(c) Substantiation of Professional Services Rates

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates bid for professional services, Canada may, but will have no obligation to, require price support in accordance with this Article. If Canada requests price support, it will be requested from all otherwise responsive bidders who have proposed a rate that is at least 20% lower than the median rate bid by all responsive bidders for the relevant resource category or categories. If Canada requests price support, the following information is required:

- (i) an invoice (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the relevant resource category, where those services were provided for at least three months within the twelve months before the bid solicitation closing date, and the fees charged were equal to or less than the rate offered to Canada;

- (ii) in relation to the invoice in (i), evidence from the Bidder's customer that the services identified in the invoice include at least 50% of the tasks listed in the Statement of Work for the category of resource being assessed for an unreasonably low rate. This evidence must consist of either a copy of the contract (which must describe the services to be provided and demonstrate that at least 50% of the tasks to be performed are the same as those to be performed under the Statement of Work in this bid solicitation) or the customer's signed certification that the services subject to the charges in the invoice included at least 50% of the same tasks to be performed under the Statement of Work in this bid solicitation);
- (iii) in respect of each contract for which an invoice is submitted as substantiation, a résumé for the resource that provided the services under that contract that demonstrates that, in relation to the resource category for which the rates are being substantiated, the resource would meet the mandatory requirements and achieve any required pass mark for any rated criteria; and
- (iv) the name, telephone number and, if available, email address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

Once Canada requests substantiation of the rates bid for any resource category, it is the sole responsibility of the Bidder to submit information (as described above and as otherwise may be requested by Canada, including information that would allow Canada to verify information with the resource proposed) that will allow Canada to determine whether it can rely, with confidence, on the Bidder's ability to provide the required services at the rates bid. If Canada determines that the information provided by the Bidder does not adequately substantiate the unreasonably low rates, the bid will be declared non-responsive.

4.4 Basis of Selection

- (a) A bid must comply with the requirements of the bid solicitation and meet all mandatory evaluation criteria in this bid solicitation to be declared responsive.
- (b) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Data Record Sets (DRS) Score is 60 while the greatest possible Total Financial Score is 40.

Step 1: Calculation of Total DRS Score:

- (A) Bidders will need to determine the number of bibliographic records, Appendix 5 to Annex B - DRS1, that can be converted to enhanced records. Bidders will need to download the bibliographic records, Appendix 5 to Annex B - DRS1, that has been provided with the solicitation document in order to determine the number of enhanced records.
- (B) The Total DRS Score will be computed for each responsive bid by converting the number of enhanced records obtained from the DRS1 package provided, using the following formula, rounded to two decimal places:

$$\frac{\text{Number of Enhanced Records from DRS1}}{\text{Total Number of DRS1 Provided}} \times 60 = \text{Total DRS Score}$$

Step 2: Calculation of Total Financial Score: The Total Financial Score will be computed for each responsive bid by converting the Total Financial Price using the following formula rounded to two decimal places:

$$\frac{\text{Lowest Total Financial Price}}{\text{Lowest Total Financial Price}} \times 40 = \text{Total Financial Score}$$

Bidder's Total Financial Price

Step 3: Calculation of the Total Bidder Score: The Total Bidder Score will be computed for each responsive bid in accordance with the following formula:

$$\text{Total DRS Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$

Example of Evaluation:

	Data Record Sets (DRS)	Number of Records	Bidder 1 Initial Contract Period	Bidder 2 Initial Contract Period	Bidder 3 Initial Contract Period
Estimated # of Enhanced Records			15,000	25,000	10,000
	DRS1	35,000	\$900.00	\$920.00	\$855.00
	DRS2	6,000	\$455.00	\$500.00	\$575.00
	DRS3	2,500	\$250.00	\$200.00	\$300.00
TOTAL			\$1,605.00	\$1,620.00	\$1,730.00

Step 1 - Establishing the Total DRS Score					
<p>Bidder 1: = $(15,000 / 35,000) * 60 = 25.71$</p> <p>Bidder 2: = $(25,000 / 35,000) * 60 = 42.85$</p> <p>Bidder 3: = $(10,000 / 35,000) * 60 = 17.14$</p>					
Step 2 - Establishing the Total Financial Score					
<p>Bidder 1: = $(\\$1,605.00 / \\$1,605.00) * 40 = 40$</p> <p>Bidder 2: = $(\\$1,605.00 / \\$1,620.00) * 40 = 39.62$</p> <p>Bidder 3: = $(\\$1,605.00 / \\$1,730.00) * 40 = 37.10$</p>					
Step 3 - Establishing the Total Bidder Score					
<p>Bidder 1: $25.71 + 40 =$ Total Bidder Score of 65.71 points</p> <p>Bidder 2: $42.85 + 39.62 =$ Total Bidder Score of 82.47** points</p> <p>Bidder 3: $17.14 + 37.10 =$ Total Bidder Score of 54.24 points</p>					

**Bidder 2 has received the highest Total Bidder Score of 82.47 points and would be recommended to contract award.

- (c) If more than one Bidder is ranked first because of identical overall scores, then the Bidder with the highest number of enhanced records from DRS1 will become the top-ranked bidder.
- (d) One contract may be awarded in total as a result of this bid solicitation.

Solicitation No. - N° de l'invitation

EP369-131548/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

618e1

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

EP369-131548

File No. - N° du dossier

618e1EP369-131548

CCC No./N° CCC - FMS No/ N° VME

-
- (e) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

PART 5 - CERTIFICATIONS

Bidders must provide the required certifications to be awarded a contract. Canada will declare a bid non-responsive if the required certifications are not completed and submitted in accordance with the articles below.

Compliance with the certifications Bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to verify Bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

5.1 Certification Precedent to Contract Award

The certifications listed below should be completed and submitted with the bid, but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

5.2 Federal Contractors Program - Certification

- (a) The Federal Contractors Program for Employment Equity (FCP) requires that some suppliers, including a supplier who is a member of a joint venture, bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to contract award. If the Bidder is subject to the FCP, evidence of its commitment must be provided before the award of the Contract.
- (b) Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the *Government Contract Regulations*. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the reduction of their workforce to fewer than 100 employees. Any bids from ineligible contractors will be declared non-responsive.
- (c) If the Bidder does not fall within the exceptions enumerated in (d)(i) or (ii) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form LAB 1168, Certificate of Commitment to Implement Employment Equity, to the Labour Branch of HRSDC.
- (d) Each bidder is requested to indicate in its bid whether it is:
 - (i) not subject to FCP, having a workforce of fewer than 100 permanent full or part-time permanent employees, or temporary employees having worked 12 weeks or more in Canada;
 - (ii) not subject to FCP, being a regulated employer under the *Employment Equity Act*, S.C. 1995, c. 44;
 - (iii) subject to the requirements of FCP, because it has a workforce of 100 or more permanent full or part-time permanent employees, or temporary employees having worked 12 weeks or more in Canada, but it has not previously obtained a certificate

number from HRSD (because it has not bid before on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is required from the Bidder; or

- (iv) subject to FCP, and has a valid certification number (e.g., has not been declared an ineligible contractor by HRSDC).
- (e) Further information on the FCP is available on the following HRSDC Website:
<http://www.hrsdc.gc.ca/en/gateways/topics/wzp-gxr.shtml>.

Note to Bidders: Bidders are requested to use the Bid Submission Form to provide information about their status under this program. For a joint venture bidder, this information must be provided for each member of the joint venture.

5.3 Former Public Servant Certification

- (a) Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below.
- (b) For the purposes of this clause,
 - (i) **"former public servant"** means a former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police and includes:
 - (A) an individual;
 - (B) an individual who has incorporated;
 - (C) a partnership made up of former public servants; or,
 - (D) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
 - (ii) **"lump sum payment period"** means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the Public Service.
 - (iii) **"pension"** means, in the context of the fee abatement formula, a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act*, R.S. 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c. C-17, the *Defence Services Pension Continuation Act*, 1970, c. D-3, the *Royal Canadian Mounted Police Pension Continuation Act*, 1970, c. R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c. R-11, the *Members of Parliament Retiring Allowances Act*, R.S., 1985, c. M-5, and that portion of pension payable to the *Canadian Pension Plan Act*, R.S., 1985, c. C-8.
- (c) If the Bidder is an FPS in receipt of a pension as defined above, the Bidder must provide the following information:
 - (i) name of former public servant;
 - (ii) date of termination of employment or retirement from the Public Service.
- (d) If the Bidder is an FPS who received a lump sum payment pursuant to the terms of a work force reduction program, the Bidder must provide the following information:
 - (i) name of former public servant;

-
- (ii) conditions of the lump sum payment incentive;
 - (iii) date of termination of employment;
 - (iv) amount of lump sum payment;
 - (v) rate of pay on which lump sum payment is based;
 - (vi) period of lump sum payment including start date, end date and number of weeks; and
 - (vii) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.
- (e) For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.
 - (f) By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

Note to Bidders: Bidders are requested to provide the information required by this clause in their Bid Submission Form.

5.4 Code of Conduct Certifications - Certifications Required Precedent to Contract Award

Bidders should provide, with their bids or promptly thereafter, a complete list of names of all individuals who are currently directors of the Bidder. If such a list has not been received by the time the evaluation of bids is completed, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Bidders must submit the list of directors before contract award, failure to provide such a list within the required time frame will render the bid non-responsive.

The Contracting Authority may, at any time, request that a Bidder provide properly completed and Signed Consent Forms (*Consent to a Criminal Record Verification form - PWGSC-TPSGC 229*) for any or all individuals named in the aforementioned list within a specified delay. Failure to provide such Consent Forms within the delay will result in the bid being declared non-responsive.

PART 6 - RESULTING CONTRACT CLAUSES

6.1 Requirement

- (a) _____ (**the Contractor**) agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with and at the prices set out in the Contract. This includes providing professional services, as and when requested by Canada to one or more locations to be designated by Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements.
- (b) **Client:** Under the Contract, the "**Client**" is the Publishing and Depository Services.
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- (d) **Defined Terms:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions. Any reference to an Identified User in the Supply Arrangement is a reference to the Client. Also, any reference to a "**deliverable**" or "**deliverables**" includes all documentation outlined in this contract.

6.2 Minimum Work Guarantee

- (a) In this clause,
 - (i) "**Maximum Contract Value**" means the amount specified in the "**Limitation of Expenditure**" clause set out in the Contract (excluding GST/HST); and
 - (ii) "**Minimum Contract Value**" means 1% of the Maximum Contract Value on the date the contract is first issued.
- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
 - (i) for default;
 - (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
 - (iii) for convenience within ten business days of Contract award.

6.3 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<http://ccua-sacc.pwgsc.gc.ca/pub/acho-eng.jsp>) issued by Public Works and Government Services Canada.

(a) **General Conditions:**

2035 (2013-04-25), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

The text under Subsection 04 of Section 41– Code of Conduct and Certifications of 2035 referenced above is replaced by:

During the entire period of the Contract, the Contractor must diligently update, by written notice to the Contracting Authority, the list of names of all individuals who are directors of the Contractor whenever there is a change. As well, whenever requested by Canada, the Contractor must provide the corresponding Consent Forms.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

4007 (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information apply to and form part of the Contract.

6.4 Contract Period

(a) **Contract Period:** The “**Contract Period**” is the entire period of time during which the Contractor is obliged to perform the Work, which includes:

- (i) The “**Initial Contract Period**”, which begins on the date the Contract is awarded and ends one year later.

6.5 Authorities

(a) **Contracting Authority**

The Contracting Authority for the Contract is:

Name: Shannon Brewster
 Title: Supply Officer
 Directorate: Informatics and Telecommunications Systems Procurement Directorate
 Public Works and Government Services Canada
 Acquisitions Branch
 Address: 11 Laurier Street, Gatineau, Quebec, K1A 0S5
 Telephone: 819 956-5879
 Facsimile: 819 956-5925
 E-mail address: shannon.brewster@pwgsc.gc.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

(b) Technical Authority (to be provided at contract award)

The Technical Authority for the Contract is:

Name: _____
 Title: _____
 Organization: _____
 Address: _____
 Telephone: _____
 Facsimile: _____
 E-mail address: _____

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority; however, the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

(c) Contractor's Representative (to be provided at contract award)

Name: _____
 Title: _____
 Telephone: _____
 Facsimile: _____
 E-mail address: _____

6.6 Payment**(a) Basis of Payment - Firm Lot Prices**

- (i) In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm lot price, as specified in Annex A for a cost of \$ _____. Customs duties are excluded and Applicable Taxes are extra.
- (ii) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (iii) **Purpose of Estimates:** All estimated costs contained in the Contract are included solely for the administrative purposes of Canada and do not represent a commitment on the part of Canada to purchase services in these amounts. Any commitment to purchase specific amounts or values of services are described elsewhere in the Contract.

(b) Limitation of Expenditure

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

(c) Method of Payment - Multiple Payments

- (i) Canada will pay the Contractor upon completion and delivery of records in accordance with the payment provisions of the Contract if:

- (A) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
 - (B) all such documents have been verified by Canada;
 - (C) the Work delivered has been accepted by Canada.
- (ii) Suppliers are to bid a firm lot price based on all records being supplied under each record set. Due to the large amount of bibliographic records for conversion under record set DRS1 (69,902), provisions are being incorporated to allow for partial payment of the records up to a maximum amount not to exceed 34,951 records monthly. Upon completion and acceptance of the records, and in accordance with the payment provisions described in this Sub-article (c), the price calculation, for payment purposes only, will be based on the monthly records received and computed using the following formula rounded to two decimal places.

$$\frac{\text{Lot Price for DRS1 (taxes excluded)}}{\text{DRS1 Total Quantity (69,902)}} \times \text{number of monthly records delivered} = \text{Monthly Price}$$

The above partial payment provisions have been granted to the set of records under DRS1 only. The final delivery of the total converted records under DRS1, as well as DRS2 and DRS3, must be in accordance with the delivery schedule outlined in Table 1 of the Statement of Work.

- (d) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**
- (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
 - (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises.

6.7 Invoicing Instructions

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision.
- (c) By submitting invoices, the Contractor is certifying that the goods have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- (d) The Contractor must provide the original of each invoice to the Technical Authority, and a copy to the Contracting Authority.

6.8 Certifications

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the entire Contract Period. If the Contractor does not comply with

any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, under the default provision of the Contract, to terminate the Contract for default.

6.9 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____.

6.10 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the following list, the wording of the document that first appears on the list has priority over the wording of any document that appears later on the list:

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions in the following order:
4007 (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2013-04-25), Higher Complexity - Services;
- (d) Annex A, Basis of Payment
- (e) Annex B, Statement of Work (SOW);
 - (i) Appendix 1 to Annex B - Glossary
 - (ii) Appendix 2 to Annex B - Criteria for Data Conversion
 - (iii) Appendix 3 to Annex B - Data Elements
 - (iv) Appendix 4 to Annex B - Data Map Publications
 - (v) Appendix 5 to Annex B - Data Record Sets (DRS) 1
- (f) Annex C, Evaluation Criteria; and
- (g) the Contractor's bid dated _____ **(to be filled out at Contract Award)**, not including any software publisher license terms and conditions that may be included in the bid, not including any provisions in the bid with respect to limitations on liability, and not including any terms and conditions incorporated by reference (including by way of a web link) in the bid.

6.11 Foreign Nationals (Canadian Contractor)

SACC Manual clause A2000C (2006-06-16) Foreign Nationals (Canadian Contractor)

Note to Bidders: Either this clause or the one that follows, whichever applies (based on whether the successful bidder is a Canadian Contractor or Foreign Contractor), will be included in any resulting contract.

6.12 Foreign Nationals (Foreign Contractor)

SACC Manual clause A2001C (2006-06-16) Foreign Nationals (Foreign Contractor)

6.13 Insurance Requirements

SACC Manual clause G1005C (2008-05-12) Insurance Requirements

6.14 Limitation of Liability - Information Management/Information Technology

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this section, even if it has been made aware of the potential for those damages.
- (b) **First Party Liability:**
- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the general conditions entitled "Intellectual Property Infringement and Royalties";
 - (B) physical injury, including death.
 - (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
 - (iii) Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
 - (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
 - (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - (B) any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated by Canada either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of 75% times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the block titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00 whichever is more.

- (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back up of its records and data.

(c) **Third Party Claims:**

- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
- (ii) If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

6.15 Joint Venture Contractor

- (a) The Contractor confirms that the name of the joint venture is _____ and that it is comprised of the following members: *[list all the joint venture members named in the Contractor's original bid]*.
- (b) With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
- (i) _____ has been appointed as the "representative member" of the joint venture Contractor and has fully authority to act as agent for each member regarding all matters relating to the Contract;
- (ii) by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
- (iii) all payments made by Canada to the representative member will act as a release by all the members.
- (c) All the members agree that Canada may terminate the Contract in its discretion if there is a dispute among the members that, in Canada's opinion, affects the performance of the Work in any way.
- (d) All the members are jointly and severally or solidarily liable for the performance of the entire Contract.

- (e) The Contractor acknowledges that any change in the membership of the joint venture (i.e., a change in the number of members or the substitution of another legal entity for an existing member) constitutes an assignment and is subject to the assignment provisions of the General Conditions.
- (f) The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.

Note to Bidders: This Article will be deleted if the bidder awarded the contract is not a joint venture. If the contractor is a joint venture, this clause will be completed with information provided in its bid.

6.16 Safeguarding Electronic Media

- (a) Before using them on Canada's equipment or sending them to Canada, the Contractor must use a regularly updated product to scan electronically all electronic media used to perform the Work for computer viruses and other coding intended to cause malfunctions. The Contractor must notify Canada if any electronic media used for the Work are found to contain computer viruses or other coding intended to cause malfunctions.
- (b) If magnetically recorded information or documentation is damaged or lost while in the Contractor's care or at any time before it is delivered to Canada in accordance with the Contract, including accidental erasure, the Contractor must immediately replace it at its own expense.

6.17 Representations and Warranties

The Contractor made statements regarding its experience and expertise in its bid that resulted in the award of the Contract. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract. The Contractor also represents and warrants that it has, and all its resources and subcontractors that perform the Work have, and at all times during the Contract Period they will have, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

6.18 Access to Canada's Property and Facilities

Canada's property, facilities, equipment, documentation, and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment, documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the Basis of Payment and additional security requirements may apply.

6.19 Termination for Convenience

With respect to Article 30 of General Conditions 2035, subarticle 4 is deleted and replaced with the following subsections 4, 5 and 6:

- 4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.

-
5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of
- (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination, or
 - (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

ANNEX A - BASIS OF PAYMENT

The bidder must provide a firm, all inclusive, FOB price for the total Data Record Sets provided in accordance with Annex B - Statement of Work, to the approval and satisfaction of the Technical Authority, GST/HST extra.

Total Bid Price \$_____

A complete breakdown of the firm all inclusive price must be provided, as per the Pricing Table below.

CONTRACT PERIOD (To be determined at time of contract award)			
Data Record Sets (DRS)	Unit of Measure	Quantity	Price
DRS1	records	69,902	\$
DRS2	records	6,000	\$
DRS3	records	2,500	\$
DRS1 + DRS2 + DRS3			= Total Financial Price:

ANNEX B - STATEMENT OF WORK

1. Requirement

The Publishing and Depository Services (PDS) Directorate of the Integrated Services Branch of Public Works and Government Services Canada (PWGSC) requires the services of a company that has proven experience in the conversion of bibliographic records from a non-Machine Readable Cataloging (MARC) bibliographic format to a MARC21 format, including record matching and upgrading using MARC source records and transfer of local data.

2. Background

PDS publishes and distributes Government of Canada publications to depository libraries, the public, federal departments and agencies, parliamentarians, the private sector, and other levels of government. The mission of PDS is to ensure that Canadians have easy, ready, and equal access to federal government publications in all formats.

Since 2002, PDS has been using a software solution developed in-house to process and catalogue Government of Canada publications using a non-standard data format. PDS has made a strategic business decision to replace the current application with a MARC-based Integrated Library System (ILS). PDS requires professional services to convert its current bibliographic data set to MARC format.

3. Objective

The objective of the contract is to acquire data conversion services to convert PDS non-MARC bibliographic records to MARC21 bibliographic records for migration to a MARC-based ILS.

4. Responsibilities

The Contractor will be responsible for, without being limited to, the following tasks and deliverables:

Tasks:

1. Match Supplied XML monograph records to and replace with available MARC21 bibliographic records. At a minimum, this would include:
 - a. Review the Criteria for Data Conversion, Appendix 2 to Annex B, and propose a record matching strategy for best results.
 - b. Match records according to the Criteria for Data Conversion Decisions.
 - c. Match Supplied XML records to Supplied MARC records created by Library and Archives Canada (LAC).
 - d. If Supplied MARC records by LAC are not available replace Supplied XML records with Derived Records from other sources. Recommend a strategy to avoid error due to incorrect ISBNs in source records.
 - e. When not available as Derived records, convert Supplied XML records to MARC 21 bibliographic records.
2. Derive or convert Supplied Master Records (serials and series) as described above in Task 1.
3. Serial issue records are not part of this project but series (monographic series) issue records are included and should be replaced by Derived records or converted to MARC 21 bibliographic records as described above in Task 1. For every series issue record, add a series statement (MARC 490) and series added entry (MARC 800-830). In the case of converted records, the series title is recorded in the PDS English and French series title and subtitle (See Appendix 4).

-
4. Populate MARC fields of Derived records with specified local data from matching Supplied XML records, according to specifications in Appendix 3 and Appendix 4.
 5. If no existing equivalent MARC records can be identified for Supplied XML records, then convert non-MARC Supplied XML records to MARC bibliographic records (as specified in Appendix 4 to Annex B). At a minimum, this would include:
 - a. Where no appropriate source records are available, the creation of a new MARC21 record (a Converted record) with PDS data copied according to specifications in the Data Map (Appendix 4 to Annex B).
 - b. Insert correct non-filing characters in the records.
 - c. Insert minimum data in 007 and 008 as identified in the Data Map.
 - d. Insert minimum data in other fields as identified in the Data Map.
 6. Generate analytical reports to document work done, and identify problems and requirements for further data cleanup. Generate reports for each batch of records. As a minimum, the reports should include the following:
 - a. All Supplied records for which no match was found.
 - b. Report of Converted records.
 - c. Other errors identified by the Contractor.
 - d. Number of bibliographic records delivered.
 - e. Other reports recommended by or available from the Contractor.

Deliverables:

1. Write a data conversion plan. At a minimum, the plan should include:
 - a. Timelines, project activities and responsibilities of the Contractor and PDS.
 - b. Any recommended changes to the Data Map that would improve results. Identify and report proposed changes for discussion with PDS.
 - c. The recommended process to achieve best results for matching of bilingual records and creation of linking fields.
 - d. The recommended process to achieve best results for population of appropriate MARC fields in Derived record with specified local data elements from matching Supplied record.
 - e. Description of the level of manual review and manipulation needed to meet the requirements.
 - f. Description of the measures taken by the Bidder for quality control.
2. For each set of provided XML records, the complete set of MARC21 bibliographic records (the Delivered record set) in accordance to Table 1 below.
3. Format of Deliverables:
 - a. All bibliographic records should be in MARC21 format, and in UTF-8 or MARC-8 character encoding for correct transmission of diacritics and special characters. UTF-8 is preferred.
 - b. All reports should be in MS Word. An electronic copy and a hard copy are required.
 - c. All documents should be written in English.

4. Conversion of Data Record Sets (DRS) Schedule:

The Contractor will be provided with three sets of records for conversion. The first set of records, Appendix 5 to Annex B - DRS1, includes all records for conversion (enhanced and basic) up to and including June 26, 2013. The second set of records, DRS2, will be composed of records for conversion (enhanced and basic) and will be provided to the Contractor on January 2, 2014. The third set of records, DRS3, will be composed of records for conversion (enhanced and basic) and will be provided to the Contractor on April 1, 2014. The conversion of each set of records will have a firm delivery date. The below table outlines the delivery schedule, the number of records per set as well as providing an overview of the above.

Table 1: Data Record Sets Schedule

Data Record Sets (DRS)	Description of Data Record Sets	Firm Amount	Delivery Date
DRS1	First set of records for conversion	69,902 records	November 15, 2013
DRS2	Second set of records for conversion	6,000 records	February 28, 2014
DRS3	Third set of records for conversion	2,500 records	May 31, 2014

5. Delivery and Acceptance:

- All deliverables are to be completed in accordance with the accepted schedule outline in Table 1: Data Record Sets Schedule.
- All deliverables will be subject to inspection and acceptance by the Technical Authority or designated representative. Inspection and acceptance of the work will be done within 10 business days.
- Should any deliverable not be in accordance with the requirements of the contract the Technical Authority will have the right to reject it or to require its correction before recommending payment.
- Any corrections must be completed with 10 business days of notification from the Technical Authority.

5. **Client Support**

PDS will provide the following data:

- Non-MARC files in XML format with data dictionary. Data is consistently-coded. Supplied Records will be provided in categorized batches listed in Appendix 1 to Annex B.
- Criteria for data conversion decisions (Appendix 2 to Annex B).
- Data definition map for non-MARC and PDS-specific data fields and the MARC fields to which they should be copied (Appendix 4 to Annex B).
- List of data elements in Supplied XML records to be copied to Derived records (Appendix 3 to Annex B).
- The full set of Supplied XML records will be delivered in categorized batches to facilitate specific processing (Appendix 2, Article 6)
- Diacritics in Supplied XML records will be in UTF-8.

6. Additional Information for Contractor

1. Background / History of the records

- a. Current bibliographic records were created in a non-MARC system that was launched in 2002. This system was populated at launch with records derived from a previous non-MARC system (MINISIS) that date back to 1992 approximately. Since 2002, the database has been populated with bibliographic records created to represent Government of Canada (GC) publications released since then as well as older publications supplied by GC organizations retroactively in electronic or hard-copy formats.
- b. Bibliographic data was created using AACR2 as a content standard but the non-MARC data standard was developed to support business requirements at the time. Records include many non-standard fields but many are now obsolete and will not be included in the set of Supplied records unless there is a continuing business requirement for them (e.g. Weekly Checklist Number, E-Book Number). PDS has provided a data mapping document, the first of two data sets for conversion, and criteria for data conversion decisions.

2. Other critical information:

- a. All bibliographic records from PDS have Government of Canada Catalogue numbers. Many of the records have ISBNs or ISSNs. Where there is an ISBN or ISSN in the Supplied XML record, it is authoritative (see 3a below).
- b. Bilingual publications are provided in a single PDS bilingual XML record, but PDS requires two MARC records (one English and one French) from this project for each of these.
- c. PDS requires separate records for every format that has been catalogued, e.g. PDF and EPUB.

3. Local practice affecting conversion

Local data fields to be converted in to the MARC records are specified in detail in the Data Map Appendix 4 and Appendix 3 Data Elements in Supplied Records to be copied to Derived Records.

Key practices are briefly described below:

- a. ISBN: PDS assigns ISBNs to Government of Canada publications under a delegated authority from Library and Archives Canada. Therefore PDS records have the correct ISBN in all cases. Other source records often have incorrect ISBNs because of errors made by author departments during their publication preparation. These errors are often subsequently recorded by cataloguing authorities that follow AACR2 regarding the Chief Source of Information for this data element. This will affect matching criteria and requires that PDS ISBN overwrites any source ISBN (if different) for a matching record.
- b. There are a number of specific PDS local fields and field data that should be copied from Supplied records and added to either Derived or Converted records as specified in Appendix 3.
- c. Serials: DSP cataloguing practice has been to catalogue a serial or series (monographic series) issue individually and associate it with a so-called "Master record". This was driven by a business requirement to have these issues individually represented in the inventory control system that manages ordering by and distribution to external clients. This requirement will end on or before April 1 2014. Therefore, in the new MARC based ILS, serial issues will be managed by a serials check-in function. Consequently, in this project Master records will be converted to MARC bibliographic serial records. Serials issue records are not part of this project.

-
- d. PDS maintains a bilingual subject thesaurus and applies subject descriptors derived from this thesaurus to its bibliographic records. These descriptors should be copied to all Derived or Converted records as specified in Appendix 3.
 - e. PDS creates separate records for different formats of the same publication, and links them. Often libraries catalogue the two formats in one record with one ISBN. PDS requires separate records with correct ISBNs for each format.
 4. PDS cataloguing standard complies with Government of Canada Official Languages Act. PDS, as an official distributor of Government of Canada publications, must provide equal access to both official languages as appropriate. Cataloguing practice will follow that of Library and Archives Canada, viz:
 - a. Unilingual publications in English or French are catalogued in the language of publication.
 - b. When there is both an English and a French edition of the same publication, the two language editions are linked. This link should be provided by MARC field 775.
 - c. Bilingual publications are catalogued with two equivalent records, one in English and one in French. The two equivalent records will use MARC 791 (English record) and 792 (French record) as linking fields.

APPENDIX 1 TO ANNEX B

GLOSSARY

Criteria for Data Conversion decisions:	guidelines for expected approach to data conversion (see Appendix 2)
Data Map:	Detailed list of PDS bibliographic data fields specifying where the data should be mapped to MARC21 (see Appendix 4)
Converted record:	a MARC record created by the contractor when a suitable Derived record is not available, that consists of data from a Supplied record converted to MARC 21 format using PDS supplied mapping.
Delivered record set:	a complete set of Derived and Converted records delivered as a result of this project
Derived record:	an existing MARC record available to the contractor, created by another cataloguing authority, and that is a match or equivalent to a given PDS record.
EBook Number	a unique bibliographic record number assigned by the current PDS system to all PDS bibliographic records when first created.
Government of Canada Catalogue Number	a unique, alpha-numeric number applied to every publication catalogued by the DSP (GC Cat. No.).
Supplied MARC record	a bibliographic record in MARC format supplied to the contractor by PDS. Such records have been created by Library and Archives Canada (LAC). Supplied MARC records are also Derived records.
Supplied XML record	a record supplied by PDS in non-MARC format that will require an equivalent MARC21 record as a deliverable.
Weekly Checklist of Canadian Government Publications	a catalogue of Government of Canada publications in all formats received by the Depository Services Program published in a print edition and online.
Weekly Checklist Number	a four digit hyphenated issue number of a Weekly Checklist issue having the form: "year year-issue issue".
Supplementary Checklist of Canadian Government Publications:	a catalogue published only online and on an occasional basis listing older electronic publications acquired by the Depository Services Program.
Supplementary Checklist Number	an alphanumeric issue number of a Supplementary Checklist issue having the form "year year-issue issue-Supp".

APPENDIX 2 TO ANNEX B

CRITERIA FOR DATA CONVERSION

1. Introduction

1. This section describes key criteria for data conversion decisions, and will be reviewed with the Contractor as part of the implementation.
2. Data Map for PDS local fields to MARC is provided in Appendix 4.
3. Data Elements in Supplied XML records to be Copied to Derived records is provided in Appendix 3.
4. Definitions are provided in Appendix 1.

2. Basic assumptions

1. The ISBNs assigned by PDS to GC publications and recorded in Supplied XML records for monographic publications are correct and have authority over all other sources.
Note: Supplied XML records may also contain ISBN assigned by other authorities. This often occurs in the case of co-published publications or non-government publications that have received a substantial level of funding or other participation by the Government of Canada. When such publications appear in the PDS catalogue, they are catalogued as if they were government publications.
2. Because Supplied XML records represent cataloguing of publications produced and published by Government of Canada organizations and distributed by the DSP to Depository Libraries, it is likely that MARC records created by various cataloguing authorities and equivalent to Supplied XML records are available.
3. The Government of Canada Catalogue Numbers assigned to Supplied records for monographic publications are correct and have authority over all other sources.
4. The ISSNs included in Supplied XML records are generally derived from LAC AMICUS serial records and may be assumed to be correct unless there is obvious and strong evidence that they are incorrect.
5. PDS will require two MARC bibliographic records (one English and one French) for every bilingual publication.
6. Unilingual publications in English or French will require catalogue records in the language of publication. Where there is both an English and a French edition of the same publication, PDS will require a linking field (expected to be 775).
7. Derived records may not include relationships to bibliographic records representing editions in other formats or languages. When Supplied XML records represent other formats and languages, then Derived or Converted records must be modified to include relationships with other represented formats and languages using linking fields as appropriate.
8. Subject headings and classification / call numbers should be accepted if they are in a Derived record. None should be created.
9. In the case of records for monographic series, PDS will require a series authority record and a linked record for every issue in the series for which a Supplied XML record is provided. Derived or Converted series issue records will include a series statement in MARC 490 and a link to the series title authority file in MARC 830.

10. The title of the Derived record should be retained and, if different or coded differently from the title in the Supplied XML record, then the title of the Supplied XML record should be placed in alternate title field (246).
11. Contractor deliverables will include a set of modified Derived records and a set of converted Supplied XML records, both in MARC21 format. Collectively, the two sets will provide MARC21 records for all Supplied XML records.

3. Data Elements for Record Matching Factors (MF)

1. Corporate Author (MF 1)

- a. A Supplied XML record will not have Corporate Author names recorded in a jurisdictional / legal name format common to MARC Authority Files.
- b. A Supplied XML record Corporate Author name format follows the current "Applied Title" of GC organizations as published by the Treasury Board Secretariat.

See :

Registry of Applied Titles [Available at : <http://www.tbs-sct.gc.ca/fip-pcim/reg-eng.asp>] Inventory of Government of Canada Organizations 2011 [Available at : <http://www.tbs-sct.gc.ca/reports-rapports/cc-se/2011/invent02-eng.asp#cha13>]

- c. Supplied XML records may include a subordinate Branch name in a separate field. If the same Branch name also appears in a Derived record, then it may be taken as a matching factor. If the Branch name does not appear in the Derived record then it may be ignored as a matching factor.

2. Title (MF 2)

- a. Supplied XML records have separate fields for title and sub-title (Other Titles Information) but frequently the title and sub-title have been recorded in the title field only as a single, punctuated text string.
- b. Because a very limited number of title fields are available in the current PDS cataloguing application, titles normally recorded in MARC fields 130, 222, 240 may be recorded in Title field. Parts of the title normally recorded in subfield n and p of field 245 may be recorded in Title field or both the Title and Subtitle fields (e.g. \$n in Title field, \$p in Subtitle field).

3. GC Catalogue Number (MF 3)

- a. A GC Cat. No. is a unique control number applied to all Supplied XML records by PDS. It is the practice of Library and Archives Canada to record this number in MARC 086. The Government of Canada Catalogue number in MARC 086 in LAC record will be a primary match point.
- b. Other cataloguing authorities may follow this practice, or record it another MARC field or not record it at all.

4. ISBN / ISSN (MF 4)

ISBNs are assigned exclusively by PDS to GC monographs; therefore, all ISBNs in Supplied XML records are authoritative matching factors. Unfortunately, GC organizations have frequently applied assigned ISBNs to their publications incorrectly. Some common errors that have been detected by PDS include:

- a. The ISBN assigned by PDS to a print edition has been applied by the author organization to other editions—typically the electronic (PDF) edition, but also the other Official Language edition, or other language edition.
- b. The ISBN assigned (pre-publication) to a proposed bilingual print edition has been applied by the author organization to either the separate English and French editions (as actually published) or to both editions.
- c. The ISBN assigned by PDS to a proposed English or French edition has been applied to a single bilingual edition (as actually published).
- d. The ISBN applied to the publication by the author organization has been derived by the author organization from a previous edition of the title and is therefore incorrect (and a duplicate).
- e. Other cataloguing authorities may follow a cataloguing procedure that takes the publication as the Chief Source of Information for the ISBN. In the cases cited above, this practice will result in incorrect ISBNs recorded in Derived Records.
- f. ISSN applied to Supplied XML records are derived from publications and validated against equivalent AMICUS (LAC) records. They are reliable matching factors.

5. Publication Format

Publication Format will be Electronic (PDF; EPUB; MP4).

6. Language of Publication

- a. Language of publication to be determined by coding of 008 and / or 041 in Derived record.
- b. Language of cataloguing should match language of publication 040\$b.

4. Evaluation of Matching Factors (MF) in Derived and Supplied XML records

1. If the data in Matching Factors (MF) 1 – 6 in both the Derived Record (DR) and in the Supplied XML Record are identical, then the DR is a match for the SR.
2. If the data in MF 1, 4 - 6 in both the DR and in the Supplied XML record are identical, then the DR is an acceptable match for the Supplied XML record.
3. If the data in MF 4 in both the DR and in the Supplied XML record are identical, but the data in MF 5 in the DR and in the Supplied XML record are not identical, then the DR is not a match for the Supplied XML record (see MF 4, a).
4. If the data in MF 1 – 2 and 5 - 6 in both the DR and in the Supplied XML record are identical but either MF 3 or MF 4 are either absent from or different in the DR and the Supplied XML record, then the DR is an acceptable match for the Supplied XML record. In this case the GC Cat. No. and the ISBN from the Supplied XML record should be copied to the DR.

Note: Many libraries do not catalogue their electronic editions – they use one record for both print and electronic, and add the URL to the record for the print, or will have a record for the electronic edition only. PDS requires separate records for electronic editions and with the correct ISBNs.

5. Conversion Procedures

1. Preferred Sources of Derived records:

- a. LAC MARC batch files from PDS web site
 - b. LAC (CaOONL)
 - c. Library of Parliament (CaOOP) in the National Union Catalogue
 - d. Other Canadian cataloguing authorities (e.g., Canadian Full Depository libraries - (<http://publications.gc.ca/site/eng/locatingOurPublications/depositoryLibraries/fullDepositories.html>)).
2. If Derived records assessed as equivalents for Supplied XML records are not available, convert Supplied XML records according to the Data Map. Create minimum 007 and 008 as specified in Data Map and generate leader field.
3. Selected field values in Supplied XML records must migrate to Derived records. The fields are shown in Appendix 3, Data Elements.

6. Batches of Records and Special Processing

1. Supplied XML records will be provided in categorized batches as follows:
 - a. Approved electronic monograph records (bilingual)
 - b. Approved electronic monograph records (English)
 - c. Approved electronic monograph records (French)
 - d. Approved electronic periodical, series and committee master records (bilingual)
 - e. Approved electronic periodical, series and committee master records (English)
 - f. Approved electronic periodical, series and committee master records (French)
 - g. Approved electronic series issue records (bilingual)
 - h. Approved electronic series issue records (English)
 - i. Approved electronic series issue records (French)

APPENDIX 3 TO ANNEX B

DATA ELEMENTS

The below data elements must be copied into Derived records. Appropriate Leader fields will be required. See Data Map (Appendix 4) for more in depth details of the data elements.

1.	E-Bookstore Identifier	[MARC 935]
2.	ISBN (if different or absent in Derived Record)	[MARC 020]
3.	Departmental Identifier	[MARC 500]
4.	Weekly Checklist Number	[MARC 590]
5.	Weekly Checklist Date	[MARC 921]
6.	Title (if different in Derived Record)	[MARC 246]
7.	Publication Status Code	[MARC 915]
8.	DSP Distribution Source	[MARC 916]
9.	DSP Distribution Method	[MARC 917]
10.	Internal Notes	[MARC 583]
11.	Related Publication Type (See Data Map)	[MARC 530 and 776]
12.	Scanned Images	[MARC 956]
13.	Subject Descriptor	[MARC 650]
14.	Short Abstract	[MARC 520]
15.	Government of Canada Catalogue Number (GC Cat. No.)	[MARC 086]
16.	Price Category	[MARC 922]
17.	Display to Public (Yes / No)	[MARC 918]
18.	Created Date	[MARC 919]
19.	Last Modified Date	[MARC 20]

Solicitation No. - N° de l'invitation

EP369-131548/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

618e1

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

File No. - N° du dossier

CCC No./N° CCC - FMS No/ N° VME

EP369-131548

618e1EP369-131548

APPENDIX 4 TO ANNEX B

DATA MAP PUBLICATIONS

(See attached hereto)

Solicitation No. - N° de l'invitation

EP369-131548/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

618e1

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

File No. - N° du dossier

CCC No./N° CCC - FMS No/ N° VME

EP369-131548

618e1EP369-131548

APPENDIX 5 TO ANNEX B DATA RECORD SETS (DRS) 1

(See attached hereto)

ANNEX C - EVALUATION CRITERIA

1.0 Mandatory Corporate Evaluation:

#	Mandatory Criteria	Bidder's Response		
		Demonstrated Experience (Bidders to insert data)	Insert Page # of Resume	Met/ Not Met
M1	<p>The Bidder must provide at least three (3) reference* projects, within the last 10 years, for which the Bidder provided bibliographic data conversion that resulted in the delivery of MARC format records.</p> <p><i>*One (1) reference project must have included the conversion of non-MARC bibliographic records to MARC 21 bibliographic format.</i></p> <p><i>* One (1) reference project must have included the creation, conversion or editing of bibliographic records in English and French.</i></p> <p>For each reference project, Bidders must identify:</p> <p>A. A project description which must include the following:</p> <ol style="list-style-type: none"> 1. Description of the record set(s) that were converted. 2. Description of the quality control procedures. 3. Description of the conversion procedure(s). Could include, but not limited to, the following: <ul style="list-style-type: none"> • Straight conversion using data mapping. • Record matching and upgrading. • Extent of automation vs manual intervention. <p>B. The project duration including start and end dates.</p> <p>C. The name and contact data for the project(s) to conduct reference checks and to ensure accuracy of the submitted information.</p>			

**Appendix 4 to Annex B -
Data Map
Publications**

A		B	C	D	E
Field Name	Values		MARC21	Notes	Legend
1					
2					
3 E-Bookstore identifier (Monograph):	number		935		AF = Authority File
4 E-Bookstore identifier (Master):	number		935		NE = No MARC Equivalent
5 GoC Catalogue #:	alpha-numeric		086 1 \$a [R]	sa 008 - 028	[NR] = Not Repeatable
6 ISBN:	number		020 \$a[R]		= blank
7 Series ISBN:	number		020 \$a[R]		– = subfield tag undecided
8 Cancelled ISBN:	number		020 [R] \$z		? = 2nd indicator must specify the number of nonfiling characters, i.e. 0-9
9 ISSN:	number		022 \$a[R]	No level specified if not in derived record	
10 Second Level ISSN:	number		022 \$a [R]		
11					
				Departmental Identifier is a unique identifier applied to publications by some, but not all Government Departments. The form of the identifier varies greatly.	
12 Departmental Identifier (English):	letters or digits or a combination of both		500 \$a" . . . "		
13 Departmental Identifier (French):	letters or digits or a combination of both		500 \$a" . . . "		
14 Weekly Checklist Number	###		590 \$a		
15 Weekly Checklist Date	YYYY/MM/DD		921 \$a		
16 Type of Publication:	Committee; Monograph; Periodical; Series		008	Committee type will not migrate	
				Single Audio CD (008 for music) 008/18-19 nn 008/20 n 008/23 q	
17	Audio CD		008, 245 ?1\$h[sound recording] [NR] 008, 245 ?1\$h[enregistrement sonore] [NR]	007/00 s 007/01 d 007/06 g	
				Single Audiocassette (008 for music) 008/18-19 nn 008/20 n 008/23 q	
18 Format of Publication:	Audiocassette		245 ?1\$h[sound recording] [NR] 245 ?1\$h[enregistrement sonore] [NR]	007/00 s 007/01 s 007/06 j	

Appendix 4 to Annex B -
Data Map
Publications

	A Field Name	B Values	C MARC21	D Notes	E	
					Legend	
1						
19	Format of Publication:	Braille	008, 245 ?1\$h[braille] [NR] 008, 245 ?1\$h[braille] [NR]	Single book in braille (008 for books) 008/23 f 008/28 f Single CD-ROM (008 for computer files) 008/23 q 008/26 d 008/28 f 007/00 c 007/01 o		
20	Format of Publication:	CD-ROM	245 ?1\$h[electronic resource] [NR] 245 ?1\$h[ressource électronique] [NR]	Single DVD (008 for visual materials) 008/28 f 008/29 q 008/33 v 007/00 v 007/01 d 007/04 v		
21	Format of Publication:	DVD	008, 245 ?1\$h[video recording] [NR] 008, 245 ?1\$h[enregistrement vidéo] [NR]	Single diskette (008 for computer files) 008/23 q 008/26 d 008/28 f 007/00 c 007/01 j		
22	Format of Publication:	Diskette	245 ?1\$h[electronic resource] [NR] 245 ?1\$h[ressource électronique] [NR]			

Appendix 4 to Annex B -
Data Map
Publications

	A	B	C	D	E
	Field Name	Values	MARC21	Notes	Legend
1				Single Books - electronic (008 for books) 008/23 s 008/28 f 007/00 c 007/01 r Continuing resource - electronic (008 for continuing resource) 008/23 s 008/28 f 007/00 c 007/01 r	
23	Format of Publication:	Electronic	245 ?1\$h[electronic resource] [NR] 245 ?1\$h[ressource électronique] [NR]	007/00 c 007/01 r	
24	Format of Publication:	Large Print	245 ?1\$a [NR] 245 ?1\$a [NR]	Single book in Large print (008 for books) 008/23 d 008/28 f	
25	Format of Publication:	Map	245 ?1\$h[cartographic material] [NR] 245 ?1\$h[document cartographique] [NR]	Single map - paper (008 for maps) 008/25 a 008/28 f 007/00 a 007/01 j 007/04 a Map serie - - papier (008 for maps) 008/25 c 008/28 f 007/00 a 007/01 j 007/04 a	

**Appendix 4 to Annex B -
Data Map
Publications**

1	A Field Name	B Values	C MARC21	D Notes	E Legend
26	Format of Publication:	Map - Electronic	245 ?1\$h[cartographic material] [NR] 245 ?1\$h[document cartographique] [NR]	Single map - electronic (008 for maps) 008/25 a 008/28 f 008/29 s 007/00 a 007/01 j 007/04 z Map serie - electronique (008 for maps) 008/25 c 008/28 f 008/29 s 007/00 a 007/01 j 007/04 z	
27		Microfiche	245 ?1\$h[microform] [NR] 245 ?1\$h[microforme] [NR]	Single microfiche (008 for books) 008/23 b 008/28 f 007/00 h 007/01 e Microfiche serie (008 for continuing resource) 008/23 b 008/28 f 007/00 h 007/01 e	

**Appendix 4 to Annex B -
Data Map
Publications**

	A Field Name	B Values	C MARC21	D Notes	E	
					Legend	
1				Monographs (008 for books) 008/28 f Continuing resource (008 for continuing resource) 008/21 m - monographic series l - updating loose-leaf n - newspaper p - periodic 008/28 f		
28	Format of Publication:	Paper	245 ?1 \$a [NR] 245 ?1 \$a [NR]			
29	Format of Publication:	Videocassette	245 ?1 \$h [videorecording] [NR] 245 ?1 \$h [enregistrement vidéo] [NR]	Single videocassette (008 for visual materials) 008/28 f 008/29 q 008/33 v 007/00 v 007/01 f 007/04 b		
30				bilingual record will split		
31	Language of the Bibliographic Record:	Bilingual, English, French	040 \$beng [NR], or 040 \$bfre [NR],			
32	Publication Status Code - Cataloguing:	Classified; In Cataloguing; Approved; Final QA	915 \$a			
33	DSP Distribution Source:	Author Department; PDS	916 \$a			
34	DSP Distribution Method:	Category 1 Map Depositories only (Obsolete); Check-box orders; Collection-R (Obsolete); For information only; Full Depositories only; Mailing List	917 \$a			
35	Internal Notes:	Free text	583 0 \$x[R]	Both the field and the subfield are repeatable.		
36	Department (Lead):	Table	110 1 \$a [NR] - Main Entry 710 \$a [R] - Added Entry 260 \$b [R] - Name of Publisher	Corporate name as coded in derived record; otherwise to 110		
37	Branch (Lead):	Table	110 1 \$b [NR] - Main Entry 710 \$b [R] - Added Entry 260 \$b [R] - Name of Publisher	Corporate name as coded in derived record; otherwise to 110		
38	English Title:	Text	245 1? \$a [NR]	As coded in derived record; otherwise to the field 245 1? \$a		
39	French Title:	Text	245 1? \$a [NR]	As coded in derived record; otherwise to the field 245 1? \$a		

**Appendix 4 to Annex B -
Data Map
Publications**

	A Field Name	B Values	C MARC21	D Notes	E	
					Legend	
1						
40	English SubTitle:	Text	245 1?#b [NR]	As coded in derived record; other wise to the field 245 1?#b		0
41	French SubTitle:	Text	245 1?#b [NR]	As coded in derived record; other wise to the field 245 1?#b		
				If derived record with ISSN, accept coding if ISSN lacking, then 245 1?#a [NR]		
42	English Series Title:	Text	245 1?#a [NR]	If derived record with ISSN, accept coding if ISSN lacking, then 245 1?#a [NR]		
43	French Series Title:	Text	245 1?#a [NR]	If derived record with ISSN, accept coding if ISSN lacking, then 245 1?#a [NR]		
44	English Series Subtitle:	Text	245 1?#b [NR]	If derived record with ISSN, accept coding if ISSN lacking, then 245 1?#b [NR]		
45	French Series Subtitle:	Text	245 1?#b [NR]	If derived record with ISSN, accept coding if ISSN lacking, then 245 1?#b [NR]		
46	English Committee Header:	Text	110 1 #a [NR] - Main Entry	Committee Header = Committee Name		
47	French Committee Header:	Text	110 1 #a [NR] - Main Entry	Committee Header = Committee Name		
48	English Committee Detail:	Text	362 1 #a[R]	Committee Detail = Issue Designation, Date etc.		
49	French Committee Detail:	Text	362 1 #a[R]	Committee Detail = Issue Designation, Date etc.		
50	English Committee Title:	Text	245 ?1#a [NR]			
51	French Committee Title:	Text	245 ?1#a [NR]			
52						
				The same types of Title Modifiers are available across all the types of records, the modifiers are not publication type dependent.		
53	English Committee Title Modifier:	Additional title (within publication)	246 13 #a			
54		Alternate title	246 3 #a			
55		At head of title	500 #a	At head of title: " "		

Appendix 4 to Annex B -
Data Map
Publications

	A Field Name	B Values	C MARC21	D Notes	E	
					Legend	
1						
56	Cover Title		246 14 ‡a			
57		[Other Language] Title		i.e., language other than English or French. Current DB has specific fields for German, Portuguese and Spanish		
58	On title page		246 3 ‡a	On title page: " "		
59	Other title		500 ‡a			
60	Partial title		246 13 ‡a			
61	Running title		246 10 ‡a			
62	Series title also given on publication as		246 17 ‡a			
63	Short title		490 0 ‡a			
64	Spine title		246 13 ‡a	other title		
65	Subtitle on cover		246 18 ‡a			
66	Title also cited as		500 ‡a	Subtitle on cover: " "		
67	Title from added title page		246 1 ‡a	246 1 ‡! Also known as: ‡a . . .		
68	Title from added title page and cover		246 15 ‡a			
69	Title of this issue		246 15 ‡a			
70	Title of this issue		246 12 ‡a			
71	Variant title		246 1 ‡a			
72	French Committee Title Modifier:			The same types of Title Modifiers are available across all the types of records, the modifiers are not publication type dependent.		
73	Titre additionnel (dans la publication)		246 13 ‡a			
74	Titre alternatif		246 3 ‡a			
75	En-tête de titre		500 ‡a	En tête du titre : " "		
76	Titre de la couverture		246 14 ‡a			
77	Titre [Autre langue]			i.e., language other than English or French. Current DB has specific fields for German, Portuguese and Spanish		
78	Sur la page de titre		246 3 ‡a	Sur la page de titre : " "		
79	Titre varié		500 ‡a			
80	Titre partiel		246 13 ‡a			
81	Titre en tête de chaque page		246 10 ‡a			
82	Deuxième titre de série imprimé sur la couverture		246 17 ‡a			
	Titre abrégé		490 0 ‡a			
			246 13 ‡a	(Other titles)		

**Appendix 4 to Annex B -
Data Map
Publications**

	A Field Name	B Values	C MARC21	D Notes	E	
					Legend	
1						
83		Titre au dos	246 18 ‡a			
84		Sous-titre imprimé sur la couverture	500 ‡a	Sous-titre de la couv.: " "		
85		Autre titre cité pour la publication	246 1 ‡a	246 1 ‡l Également cité: ‡a . . .		
86		Titre de la page de titre additionnelle	246 15 ‡a			
87		Titre de la page de titre et de la couverture additionnelles	246 15 ‡a			
88		Titre de ce numéro	246 12 ‡a			
89		Titre de renvoi	246 1 ‡a			
90						
				The same types of Title Modifiers are available across all the types of records, the modifiers are not publication type dependent.		
91	English Additional Title:		246			
92	English Additional Title Modifier:	Additional title (within publication)	246 13 ‡a			
93		Alternate title	246 3 ‡a			
94		At head of title	500 ‡a	At head of title: " "		
95		Cover Title	246 14 ‡a			
				i.e., language other than English or French. Current DB has specific fields for German, Portuguese and Spanish		
96		[Other Language] Title	246 3 ‡a			
97		On title page	500 ‡a	On title page: " "		
98		Other title	246 13 ‡a			
99		Partial title	246 10 ‡a			
100		Running title	246 17 ‡a			
101		Series title also given on publication as	490 0 ‡a			
102		Short title	246 13 ‡a	other title		
103		Spine title	246 18 ‡a			
104		Subtitle on cover	500 ‡a	Subtitle on cover: " "		
105		Title also cited as	246 1 ‡a	246 1 ‡l Also known as: ‡a . . .		
106		Title from added title page	246 15 ‡a			
107		Title from added title page and cover	246 15 ‡a			
108		Title of this issue	246 12 ‡a			
109		Variant title	246 1 ‡a			

Appendix 4 to Annex B -
Data Map
Publications

	A Field Name	B Values	C MARC21	D Notes	E	
					Legend	
1						
110						
				The same types of Title Modifiers are available across all the types of records, the modifiers are not publication type dependent.		
111	French Additional Title:		246			
112	French Additional Title Modifier:	Titre additionnel (dans la publication)	246 13 ‡a			
113		Titre alternatif	246 3 ‡a			
114		En-tête de titre	500 ‡a	En tête du titre : " "		
115		Titre de la couverture	246 14 ‡a			
				i.e., language other than English or French. Current DB has specific fields for German, Portuguese and Spanish		
116		Titre [Autre langue]	246 3 ‡a			
117		Sur la page de titre	500 ‡a	Sur la page du titre : " "		
118		Titre varié	246 13 ‡a			
119		Titre partiel	246 10 ‡a			
120		Titre en tête de chaque page	246 17 ‡a			
121		Deuxième titre de série imprimé sur la couverture	490 0 ‡a			
122		Titre abrégé	246 13 ‡a	(other title)		
123		Titre au dos	246 18 ‡a			
124		Sous-titre imprimé sur la couverture	500 ‡a	Sous-titre de la couv : " "		
125		Autre titre cité pour la publication	246 1 ‡a			
126		Titre de la page de titre additionnelle	246 15 ‡a			
127		Titre de la page de titre et de la couverture additionnelles	246 15 ‡a			
128		Titre de ce numéro	246 12 ‡a			
129		Titre de renvoi	246 1 ‡a			
130						
131	Statement of Responsibility (English):		245 17 ‡c [NR]			
132	Statement of Responsibility (French):		245 17 ‡c [NR]			
133	Edition Statement (English):		250 ‡a [NR]			
134	Edition Statement (French):		250 ‡a [NR]			
135	Map Data (English):		255 ‡a [R]			

**Appendix 4 to Annex B -
Data Map
Publications**

	A Field Name	B Values	C MARC21	D Notes	E	
					Legend	
1	136 Map Data (French):		255 \$a [R]			
	137 Place of Publication:		260 \$a [R]	and 008 / 15-17 see "Name of publication codes" table for the 3 letters code in 008/15-17		
	138 Date of Publication (English):		260 \$c [R]	and 008 / 06-14 take only 4 digits from the Date of publication field in Ebook - \$yyy see also Year for Search and Sort below		
	139 Date of Publication (French):		260 \$c [R]	and 008 / 06-14 take only 4 digits from the Date of publication field in Ebook - \$yyy see also Year for Search and Sort below		
	140 Issue Designation (English):		362 1 \$a [R]	closed date: take the beginning year and the last year of publishing from the Ebook field - \$yyyyyy open date: take the beginning year and add 9999 - \$yyy9999		
	141 Issue Designation (French):		362 1 \$a [R] Monograph: 008 / 06-14 Serial: 008 / 06-14 \$yyy9999 245 \$h [text] 008 / 35-37	and 008 / 06-14 closed date: take the beginning year and the last year of publishing from the Ebook field - \$yyyyyy open date: take the beginning year and add 9999 - \$yyy9999		
	142 Year for Search and Sort:	4 digits				
	143 Format:					
	144 Language of Publication (English):		041 \$a [R] for bilingual publications	use the MARC Code List for Languages		

**Appendix 4 to Annex B -
Data Map
Publications**

	A Field Name	B Values	C MARC21	D Notes	E	
					Legend	
1						
145	Language of Publication (French):		008 / 35-37	use the MARC Code List for Languages		
146	Language of Publication (Other):		008 / 35-37 041 \$a [R]	use the MARC Code List for Languages		
147	Language of Publication (Bilingual):	English, French (Bilingual)	041 \$a [R]	English record linking field = 791		
148				French record linking field = 792		
149	Language of Volume (English):		546 [R]			
150	Language of Volume (French):		546 [R]			
			008 / 18 (for Braille, Large Print, Microfiche and Paper) or 006/02 (for Audio CD, Audiocassette, CD-Rom, DVD, Diskette, Map and Videocassette)			
151	Serial Frequency:		310 \$a [NR]	see MARC "Serial frequency and regularity" table for frequency codes		
152	Collation:		300 \$b [NR]			
153	Binding:		037 \$f [R]			
154	Pagination Description (English):		300 \$a			
155	Pagination Description (French):		300 \$a			
156	Width:		300 \$c			
157	Height:		300 \$c			
158						
159	Related Publication Title:	Text	\$t in 77X - 78X fields			
160						
161						
162	Other Language Edition [English]	E-Bookstore identifier of related record	546 \$a 775 0 \$at\$w	\$w = system control number		
163	Other Language Edition [French]	E-Bookstore identifier of related record	546 \$a 775 0 \$at\$w	\$w = system control number		
164	Other Language Edition [Other]	E-Bookstore identifier of related record	546 \$a 775 0 \$at\$w	\$w = system control number		
165						
	Related Publication Relationship Type [English]					
166	- Audio CD	E-Bookstore identifier of related record	530 \$a*Also available on Audio CD* 776 0 \$a \$t \$w \$x \$z	\$w = system control number		

**Appendix 4 to Annex B -
Data Map
Publications**

	A		B		C		D		E	
	Field Name		Values		MARC21		Notes		Legend	
1										
167	Related Publication Relationship Type [English] - Audiocassette		E-Bookstore identifier of related record		530 \$a "Also available on Audiocassette" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			
168	Related Publication Relationship Type [English] - Braille		E-Bookstore identifier of related record		530 \$a "Also available in braille" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			
169	Related Publication Relationship Type [English] - CD-ROM		E-Bookstore identifier of related record		530 \$a "Also available on CD-ROM" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			
170	Related Publication Relationship Type [English] - DVD		E-Bookstore identifier of related record		530 \$a "Also available on DVD" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			
171	Related Publication Relationship Type [English] - Diskette		E-Bookstore identifier of related record		530 \$a "Also available on diskette" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			
172	Related Publication Relationship Type [English] - Electronic		E-Bookstore identifier of related record		530 \$a "Also available in electronic format" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			
173	Related Publication Relationship Type [English] - Large print		E-Bookstore identifier of related record		530 \$a "Also available in large print" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			
174	Related Publication Relationship Type [English] - Map		E-Bookstore identifier of related record		530 \$a "Also available as a map" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			
175	Related Publication Relationship Type [English] - Microfiche		E-Bookstore identifier of related record		530 \$a "Also available on microfiche" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			
176										
177	Related Publication Relationship Type [English] - Continues		E-Bookstore identifier of related record		780 00 \$a \$t \$w \$x0		\$w = system control number			
178	Related Publication Relationship Type [English] - Continued by		E-Bookstore identifier		785 00 \$a \$t \$w \$x		\$w = system control number			
179										
180	Related Publication Relationship Type [English] - Formed by the merger of		E-Bookstore identifier		580 \$a "Formed by the merger of [title]" 780 04 \$a \$t \$w \$x		\$w = system control number			
181	Related Publication Relationship Type [English] - Merged to form		E-Bookstore identifier		580 \$a "Merged to form [title]" 785 07 \$a \$t \$w \$x		\$w = system control number			
182										
183	Related Publication Relationship Type [French] - Cédérom audio		E-Bookstore identifier		530 \$a "Egalement disponible en CD Audio" 776 0 \$a \$t \$w \$x \$z		\$w = system control number			

**Appendix 4 to Annex B -
Data Map
Publications**

	A	B	C	D	E
	Field Name	Values	MARC21	Notes	Legend
1	Related Publication Relationship Type [French]				
184	- Audiocassette	E-Bookstore identifier	530 Ꝁa "Également disponible en audiocassette" 776 0 Ꝁa Ꝁt Ꝁw Ꝁx Ꝁz	Ꝁw = system control number	
185	- Braille	E-Bookstore identifier	530 Ꝁa "Également disponible en braille" 776 0 Ꝁa Ꝁt Ꝁw Ꝁx Ꝁz	Ꝁw = system control number	
186	- CD-ROM	E-Bookstore identifier	530 Ꝁa "Également disponible en CD-ROM" 776 0 Ꝁa Ꝁt Ꝁw Ꝁx Ꝁz	Ꝁw = system control number	
187	- DVD	E-Bookstore identifier	530 Ꝁa "Également disponible en DVD" 776 0 Ꝁa Ꝁt Ꝁw Ꝁx Ꝁz	Ꝁw = system control number	
188	- Disquette	E-Bookstore identifier	530 Ꝁa "Également disponible en disquette" 776 0 Ꝁa Ꝁt Ꝁw Ꝁx Ꝁz	Ꝁw = system control number	
189	- Électronique	E-Bookstore identifier	530 Ꝁa "Également disponible en format électronique" 776 0 Ꝁa Ꝁt Ꝁw Ꝁx Ꝁz	Ꝁw = system control number	
190	- Imprimée en gros caractères	E-Bookstore identifier	530 Ꝁa "Également disponible en gros caractères" 776 0 Ꝁa Ꝁt Ꝁw Ꝁx Ꝁz	Ꝁw = system control number	
191	- Carte	E-Bookstore identifier	530 Ꝁa "Également disponible sous forme de document cartographique" 776 0 Ꝁa Ꝁt Ꝁw Ꝁx Ꝁz	Ꝁw = system control number	
192	- Microfiche	E-Bookstore identifier	530 Ꝁa "Également disponible en microfiche" 776 0 Ꝁa Ꝁt Ꝁw Ꝁx Ꝁz	Ꝁw = system control number	
193	- Continue	E-Bookstore identifier	780 00 Ꝁa Ꝁt Ꝁw Ꝁx	Ꝁw = system control number	
194	- Est continué(e) par	E-Bookstore identifier	785 00 Ꝁa Ꝁt Ꝁw Ꝁx	Ꝁw = system control number	
195					
196					
197	- Est formé(e) par la fusion de [titre]	E-Bookstore identifier	580 Ꝁa "Est formé(e) par la fusion de [titre]" 780 04 Ꝁa Ꝁt Ꝁw Ꝁx	Ꝁw = GC Cat. No.	
198	- Fusionnées pour former [titre]	E-Bookstore identifier	580 Ꝁa "Fusionnées pour former [titre]" 785 07 Ꝁa Ꝁt Ꝁw Ꝁx	Ꝁw = GC Cat. No.	
199	- Fusionnées pour former				
200	Related Publication Catalogue No:	alpha-numeric	subfield Ꝁ w in Linking Entry Fields	Ꝁw = system record number	
201					
202	Issue Notes (English):	Text	500 Ꝁa		
203	Issue Notes (French):	Text	500 Ꝁa		
204	Series Notes (English):	Text	500 Ꝁa		
205	Series Notes (French):	Text	500 Ꝁa		

**Appendix 4 to Annex B -
Data Map
Publications**

Field Name	B Values	C MARC21	D Notes	E	
				Legend	
1					
206					
207	Accompanied By (English):	300 <i>te</i>			
208	Accompanied By (French):	300 <i>te</i>			
209	General Note (English):	500 <i>ta</i>			
210	General Note (French):	500 <i>ta</i>			
211	Scanned Images:	956 42 <i>ta</i> [URL] <i>tq</i> [jpeg] <i>tw</i> [system control number] <i>t3</i> [cover scan]			
212					
213	URL (English)		<i>tu</i> PDS source = URL <i>tq</i> PDS source = File Format <i>ts</i> PDS source = File Size		
		856 40 <i>tu</i> "URL" <i>tq</i> "Adobe Acrobat" <i>ts</i> "File Size" [R]			
214	URL (French)		<i>tu</i> PDS source = URL <i>tq</i> PDS source = File Format <i>ts</i> PDS source = File Size		
		856 40 <i>tu</i> "URL" <i>tq</i> "Adobe Acrobat" <i>ts</i> "File Size" [R]			
215	File Format				
		856 40 <i>tu</i> "URL" <i>tq</i> "Adobe Acrobat" <i>ts</i> "File Size" [R]			
216	File Size				
		856 40 <i>tu</i> "URL" <i>tq</i> "Adobe Acrobat" <i>ts</i> "File Size" [R]			
217	External URL(s) (English)		<i>tu</i> PDS source = URL <i>tq</i> PDS source = File Format <i>tz</i> PDS source = File Size		
		856 40 <i>tu</i> "URL" <i>tq</i> "HTML" <i>tz</i> "Accessible on the Statistics Canada web site at the time of cataloguing" [R]			
218	External URL(s) (French)		<i>tu</i> PDS source = URL <i>tq</i> PDS source = File Format <i>tz</i> PDS source = File Size		
219		856 40 <i>tu</i> "URL" <i>tq</i> "HTML" <i>tz</i> "Disponible sur le site web de Statistiques Canada au moment du catalogue"[R]			
220	System Requirements (English):	538 <i>ta</i> [R]			
221	System Requirements (French):	538 <i>ta</i> [R]			
222					
223	Subject (English)		Subject descriptors derived from a bilingual thesaurus maintained by PDS and applied to most PDS bibliographic records		
224	Subject (French)	650 07 <i>ta</i> [term] <i>t2g</i> cpds [R] 650 07 <i>ta</i> [term] <i>t2g</i> cpds [R]			
225					
226	Short Abstract (English):	520 3# <i>ta</i> [R]			
227	Short Abstract (French):	520 3# <i>ta</i> [R]			
228					

Appendix 4 to Annex B -
Data Map
Publications

	A	B	C	D	E
1	Field Name	Values	MARC21	Notes	Legend
229	Price Category:	Free/Priced	922 ‡a		
230	Price 1 (\$):	digits or blank	037 ‡c [R]	020 ‡c	
231	Price Type 1:	Table (Canada/Foreign) or blank	037 ‡n [R]		
232	Price Description (English) 1:	text	037 ‡n [R]		
233	Price Description (French) 1:	text	037 ‡n [R]		
234	Price 2:	digits or blank	037 ‡c [R]		
235	Price Type 2:	Table (Canada/Foreign) or blank	037 ‡n [R]		
236	Price Description (English) 2:	text	037 ‡n [R]		
237	Price Description (French) 2:	text	037 ‡n [R]		
238					
239	Display to Public:	Value = "Yes" OR "No"	918 ‡a		
240					
241	Created Date [PDS DB]:	YYYY/MM/DD	919 ‡a		
242	Last Modified Date [PDS DB]:	YYYY/MM/DD	920 ‡a		