



**MAIL BIDS TO :
ENVOYER LES SOUMISSIONS À:**

Contracting Officer : Solinda Phan
 Agente d'approvisionnement | Supply Officer
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 | Secure Channel Division
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 Canada
 Portage III, 12C1-64
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 Gatineau, QC, K1A 0S5

**SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION**

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

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

Comments - Commentaires

**THIS DOCUMENT CONTAINS A
SECURITY REQUIREMENT / CE
DOCUMENT CONTIENT DES
EXIGENCES RELATIVES À LA
SÉCURITÉ**

Issuing Office – Bureau de distribution
 SSC | SPC
Procurement and Vendors Relationships |
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 XK Division | Division XK
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Title – Sujet Strategic Advisory Services – Sourcing and Benchmarking Service-conseils stratégiques – Approvisionnement et analyses comparatives	
Solicitation No. – N° de l'invitation 10031544/A	Amendment No. – 003
Client Reference No. – N° référence du client 13-1620	Date September 13, 2013
File No. – N° de dossier CAC10031544	
Solicitation Closes – L'invitation prend fin at – à 11 :59 PM on – le October 4, 2013	Time Zone Fuseau horaire Eastern Daylight Time (EDT) / Heure Avancée de l'Est (HAE)
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
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Delivery required - Livraison exigée See Herein	Delivered Offered – Livraison proposée
Destination – of Goods, Services, and Construction: Destination – des biens, services et construction : See Herein	
Vendor/firm Name and address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Facsimile No. – N° de télécopieur	
Telephone No. – N° de téléphone	
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 _____

This amendment is raised to answer Industry questions and modify the RFP, Annex A – SOW, and Attachment 4.1 – Technical Requirements, and Forms 2, 3, and 4.

Question 4:

Re Section 2.2.1 and the cover page: [Vendor] is requesting an extension until Oct 4 2013 due to the large number of client references required at a busy time of year for many of our private and public sector clients.

Answer 4:

See Amendment 002.

Question 5:

This question relates to Part 7 – RESULTING CONTRACT CLAUSES, Section 7.9 “Discretionary Audit – Commercial Goods and/or Services. A competitive qualification process such as this RFP which requires respondents to assess their pricing for competitive advantage purposes militates against the need for the inclusion of an MFC provision. In this case, as respondents determine their responses, market-driven forces will ultimately come to guide pricing. The crown will have the opportunity to assess those responses and qualify respondents accordingly. Moreover, there is no actual engagement established through this qualification process which further provides the crown with control over pricing for the response to the applicable future engagement for qualified respondents. For these reasons, Crown procurements have moved away from including MFC requirements. Given (i) that inclusion of an MFC clause is more appropriate for non-competitive solicitations where market-driven pressures on pricing are not necessarily present and (ii) that such requirement does not appear to have been included in the previous TBIPS solicitations for Business and Technical Services and PMO Services, will the crown agree to delete clause and retain a market-driven competitive pricing procurement in this solicitation?

Answer 5:

Section 7.9 Discretionary Audit – Commercial Goods and/or Services is only applicable if one submission is received for this solicitation. Canada will not make the requested change.

Question 6:

Section 1.2 of the RFP identifies that, due to previous announcements with respect to email, networks and data centers, this procurement is subject to the National Security Exemption. As we understand the NSE, resources will be required to hold SECRET level security clearances at the time that a contract is issued. In the RFP, SSC appears to have indicated a desire to leverage global resources (i.e. the selected vendor must have offices on multiple continents). How does SSC plan to deal with security clearances for global (i.e. non-Canadian) resources in order to maintain the National Security Exemption? Securing Canadian issued security clearances may not be achievable at the time of the signing of a contract, as international (i.e. NATO) clearances can take several months, and are beyond the control of SSC. Would SSC please clarify how it will deal with security clearances for non-Canadian resources? ?

Answer 6:

As per Section 7.5.2 Security Requirement for Foreign Supplier, equivalent foreign security clearances from countries that hold a Memorandum of Understanding with the Director International Industrial Security Directorate (IISD), Public Works and Government Services Canada (PWGSC) will be accepted for this solicitation. Bidders with non-Canadian resources will need to contact the respective country NSA/DSA in order to comply with the provisions of the Bilateral Industrial Security Memorandum of Understanding between the foreign recipient Contractor's NSA/DSA and the Government of Canada, in relation to sensitive information/assets equivalencies. The Contracting Authority reserves the right to conduct validation of assurances of Foreign suppliers security clearances.

Question 7:

Section 4.2 Identifies the need for bidders to secure primary and back-up contacts for named client references. In addition, the RFP requires in Section 4.2.3.4.4, that if bidders need to use references more



than once, they must submit multiple forms. For our firm to use a client reference, client approval is required, and often from senior levels. Given the due date of the RFP, the client reference requirements will make it logistically impossible to complete up to 60 client references for the number of projects required to score 100% on the technical proposal. Would SSC please remove the requirement for named client references, and the requirement for primary customer contacts, and replace these with a requirement that the selected vendor must provide SSC with contacts for selected mandatory requirements, if asked? Recommend that the reference requirement be removed, as was done for the previous TBPIPS Business and Technical Services and PMO Services RFPs. Alternatively, we recommend that SSC could check a subset of the references of the selected bidder, in order to give all vendors a better chance of submitting by the due date.

Answer 7:

See Modifications 006-016 and 018-021.

Question 8:

We appreciate that SSC is looking to establish a strategic advisor for sourcing advice on the most significant sourcing and transformational initiatives on the current government agenda. SSC is using a very high requirement for corporate and client references. We respectfully submit that the response timeline does not provide us with enough time to source, write and approve the required references through our own and our client's business and legal channels. This puts our firm in a strong potential no-bid situation. Would SSC Please extend the submission date by three weeks to October 11, 2013

Answer 8:

See Amendment 002.

Question 9:

Section 7.8.4.5 states that "Credits represent Liquidated Damages: The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty."

The completion of requirements is dependent upon SSC, other government departments and potentially third parties completing their deliverables, approvals and acceptances. Failure by any of these parties to perform within the project plan timelines could cause Contractor to miss this milestone through no fault of its own. We recommend that credits representing liquidated damages are unclearly defined, therefore we recommend that they either clarified or removed from the RFP.

Answer 9:

Section 7.8.4.5 is in reference to Section 7.8.4.1. Credits would only apply if the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract or validly issued Task Authorization.

Question 10:

Section 7.23 currently reads: "The Contractor agrees that, in the period leading up to the end of the Contract Period, it will make all reasonable efforts to assist Canada in the transition from the Contract to a new contract with another supplier. The Contractor agrees that there will be no charge for these services." This clause is too broad as it does not define what efforts would be "reasonable" (e.g. the transition period could be capped at two months).

Answer 10:

Canada will remove Section 7.23 Transition Services at end of Contract Period. See Modification 015



Question 11:

Requirement M8 requires the bidder to: “demonstrate a **bench-strength** consisting of a minimum of fifty (50) qualified employees”. Without qualification, this requirement assumes that all resources will be Canadian and will hold SECRET Clearances to meet the National Security Exemption. We believe SSC is looking for a combination of Canadian and global resources, given other requirements throughout the RFP for leading experience and global footprint. Due to the global nature of our business, it is not reasonable for firms to have 50 Canadian, SECRET cleared resources in the categories specified in the RFP. Would SSC please clarify:

1. Vendors are able to use global resources
2. What are the compliance expectations for SSC, a list of employees and their titles, and the related resource requirements?
3. How SSC intends to deal with Security Requirements, in view of the National Security Exemption

Answer 11:

This question will be addressed in a subsequent amendment.

Question 12:

Mandatory requirements 3 and 4 are virtually identical with the exception of M.3 specifying “a minimum of 5000 employees” and M.4 specifying “where each project was valued greater than \$500,000. Currently, SSC is requiring two sets of references, adding a significant amount of work for respondents. Would Canada consider (a) combining the requirements into a single requirement, or (b) removing the reference in M.3 to “a separate client reference”. In other words, if a customer reference exists that covers the “5000 employee” and “\$500,000” requirement. Would Canada accept the same client reference for M.3 and M.4?

Answer 12:

Yes, Canada will accept the same client reference across multiple technical criteria. As indicated in Attachment 4.1 – Technical Criteria, unless otherwise stated, client references provided for each technical criterion may be used for a separate technical criterion. For example, if References A, B, and C are used on M.1, they can also be used for M.2. The intent of having a separate client reference is to ensure that Bidders provide 3 distinct client references for a single criterion.

Question 13:

We appreciate that Canada wants to ensure that the selected vendor has experience with major IT consulting engagements of similar size and complexity as will be undertaken at SSC. However, the current requirement is that “the value of each engagement was greater than \$20-million”, and be “in addition to any previously stated references”. We are unclear as to why these references need to be in addition to any previously named references. Would Canada please remove the requirement that these references be “in addition to any previously stated reference”.

Answer 13:

This question will be addressed in a subsequent amendment.

Question 14:

Section 3 of Annex A states that “The Contractor will be an organization with significant international depth and breadth of experience in the following key areas:

- a. the development of sourcing strategies;
- b. the benchmarking of IT services;
- c. the provisioning of negotiation assistance and expertise for contracting of Goods and Services; and
- d. the provisioning of support in the execution of IT contracts.



Is it SSC's intent that the services in the statement of work are meant to support pre-defined IT Strategies for the major transformation projects? To what extent will the successful Contractor be engaged in the development of the strategies for the 5 transformation areas in Section 2.2 of the Statement of Work.

Answer 14:

It is Canada's intent that the Contractor will join Canada and assist with work supporting the development of IT Sourcing Strategies that is already underway. The successful Contractor will be required to support any or all of the transformation areas described in Section 2.2 on an as-and-when required basis.

Question 15:

With respect to ensuring the integrity of the GC's core IT infrastructure supply chain, the RFP currently states: in Section 3 of Annex A, that:

- The Contractor will have demonstrated credibility with the global IT supply chain, having executed engagements, on an even distribution, with firms both in North America and in countries and regions currently engaged in the IT supply chain such as India, China, Vietnam, South Korea, etc.
- The Contractor firm will have a physical presence on a global basis with offices on each developed continent, with offices specifically located in areas of relevance to the IT supply chain."

Although many firms work for many global technology companies, this requirement does not clearly reflect isn't how IT purchasing is commonly conducted. Unless Canada wants highly customized solutions, which is highly unlikely. SSC will rely on industry standards and multiple vendors to compete for your business. Many of the OEM's are not vertically integrated and outsource many of their processes. It may not be reasonable to expect that as an IT buyer, SSC would get involved in production down to the component level (e.g. circuit boards, as is referenced in the RFP). In addition, this notion doesn't reflect the desire stated in the RFP to use standard Benchmarks. There are other industry standard means of securing the supply chain and these can be addressed by SSC and the supplier without the need for points of presence "in areas of relevance to the IT Supply chain". We also suggest that Canada already maintains points of presence in these regions. This requirement should be removed.

Answer 15:

Canada will respond to this question in a subsequent amendment.

Question 16:

Given the complexity of this RFP we request that SSC provide a 2 week extension to the bid closing date. Specifically, we anticipate that approximately 45 to 60 different project references will be required to successfully respond to this RFP. While the writing of the references is limited to 500 words, each reference must be accompanied by a signature or email attestation from the project client. Given SSC is seeking global experience and qualifications through this RFP, we anticipate we will require more than 4 weeks to successfully make these contacts and gain the appropriate approvals from our clients around the world.

Answer 16:

See Amendment 002 and Modifications 006-016 and 018-021.

Question 17:

This question revolves around the requirement to provide detailed contact information for the project references in the mandatory and rated requirements. Specifically, this RFP outlines a robust set of mandatory and rated corporate project references that all bidders must provide. In our experience, SSC has set a sufficiently high threshold for these requirements that many of these references will come from large, global private sector clients rather than domestic or international public sector clients. It is also our experience that many private sector clients are willing to allow their service providers (like us) to release project information but are extremely sensitive about releasing information that ties project information



back to their individual company. Most often this is done out of a desire not to release information that could provide competitors with competitive intelligence. Will SSC consider rewording this requirement to allow the use of project references without the inclusion of company and contact information but with an assurance that a reference is available upon request?

Answer 17:

See Modifications 006-016 and 018-021.

Question 18:

Please clarify if individual client references can be used for more than one mandatory requirement or if references cannot be duplicated/repeated across mandatory requirements where appropriate.

Answer 18:

See response to Question 12.

Question 19:

Please confirm the "project value" referenced in M.1 is the total value/scope of the client sourcing project and not the fees or contract value of the advisory services provided in each reference project.

Answer 19:

Correct. The project value refers to the client's project value, not the contract value undertaken by the Bidder as part of a project.

Question 20:

It is unclear what the difference is between "Contract Delivery" and "Contract Management" activities in M.1. Please provide examples of each to assist bidders in selecting project references that align to your needs.

Answer 20:

"Contract Delivery" refers to the processes undertaken up until the award of a contract to a successful Contractor; whereas "Contract Management" activities refer to those processes undertaken after award of a contract to a successful Contractor.

Question 21:

Please confirm the "project value" referenced in M.4 is the total value/scope of the activities being benchmarked and not the fees or contract value of the benchmark services provided in each reference project.

Answer 21:

See response to Question 19.

Question 22:

The RFP documentation outlines a format for all mandatory and rated requirements (e.g., Form 2 or Form 3) with the exception of R.6. Is it the intention of SSC for bidders to use one of these forms for R.6 or for bidders to develop their own format?

Answer 22:

See Modifications 006-016 and 018-021.



Question 23:

Point Rated criteria R5 requests client references where the value of the engagement was greater than \$20 million. Herein it states that "The value of the engagement refers to the "contract value" of the engagement between the Bidder and its client, and not the value of the project that was undertaken by the Bidder." Please clarify if this should instead say "undertaken by the client".

Answer 23:

See Modification 018.

Question 24:

Point Rated Criteria R6 requests that the bidder demonstrate the provisions of IT sourcing and benchmarking services, where the project value was over \$1 billion, and to gain maximum points the bidder would have to provide 5 of these. This is an exceptionally high project value. Will the Crown consider reducing this to \$500 million, which is in line with Mandatory Criteria #1?

Answer 24:

Canada will not make the requested change.

Question 25:

The closing time and date on page 1 of the RFP is 11:59 pm, September 20th. In the bid preparation instruction SSC is requesting hard copies and CD copies of the proposal. Given the closing time is SSC expecting the proposal to be delivered by email? Please confirm the delivery instructions.

Answer 25:

Bidders are to submit their proposals by mail. Bids delivered by hand or transmitted by facsimile or electronically will not be accepted. Please refer to Sections 2.1.6 and 2.2 for further details.



Modification 005:

On Page 7 of 55 of the RFP, Section 2.2 Submission of Bids, Subsection 2.2.1:

Delete in its entirety.

Insert: Bids must be mailed to Shared Services Canada by the date, time and place indicated on page one (1) of the bid solicitation.

Modification 006:

On Page 12 of 55 of the RFP, Section 3.2 Section I: Technical Bid, Subsection 3.2.2.3 Customer Reference Contact Information:

Delete in its entirety.

Insert:

3.2.2.3.1 The Bidder must provide client references who must each confirm if requested by SSC that Bidder meets the criteria, as specified in Attachment 4.1 – Technical Criteria.

3.2.2.3.2 The format to be used to request confirmation from customer references is as follows:

Sample Question to Client Reference: "Has [the bidder] provided your organization with [describe the services and, if applicable, describe any required timeframe 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.

3.2.2.3.3 For each client reference, the Bidder must, at a minimum, provide the name and email address for a contact person. Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the Bidder has provided to its client and who is willing to act as a client reference.

3.2.2.3.4 If a reference is a "Confidential Client" due to security and/or confidentiality/client privacy obligations, the Bidder should provide the references on a separate CD-ROM or DVD from the Technical Bid clearly labelled Confidential. After the solicitation closes the Contracting Authority will remove and secure the Reference CD-ROM or DVD from the Technical Bid. (Confidential Client still being vetted by Legal)

3.2.2.3.5 Crown references will be accepted.

Modification 007:

On Page 10 of 55 of the RFP, Section 3.1 Bid Preparation Instructions, Subsection 3.1.1.1 Section I Technical Bid:

Add:

3.1.1.1.3 1 CD-ROM or DVD containing the Bidder's confidential client list (if applicable) in Adobe PDF compatible format. The disks should be clearly labelled on their face as follows:

3.1.1.1.3.1 The Bidder's name;



- 3.1.1.1.3.2 The solicitation number;
- 3.1.1.1.3.3 “Technical Proposal – Confidential Client References”; and
- 3.1.1.1.3.4 The signature of the authorized representative of the Bidder.

Modification 008:

On Page 11 of 55 of the RFP, Section 3.2 Section I: Technical Bid, Subsection 3.2.2.2 Substantiation of Technical Compliance Form:

Delete in its entirety.

Insert: The technical bid must substantiate the compliance of the Bidder with the specific articles of Attachment 4.1 – Technical Criteria identified in the Substantiation of Technical Compliance Cross-Reference List. The Substantiation of Technical Compliance Cross-Reference List is not required to address any parts of this bid solicitation not referenced in the list. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements. Simply stating that the Bidder complies is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be declared non-responsive and disqualified or rated accordingly. The Bidder must reference where in the bid the substantiation 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.

Modification 009:

On Page 13 of 55 of the RFP, Section 4.2 Technical Evaluation, Subsection 4.2.2 Mandatory Technical Criteria:

Add:

- 4.2.2.3 Bidders must substantiate for each Mandatory Technical Criteria M.1 to M.9 their claim that they fulfill the criteria by providing the required information as stated by the criteria. Bidders must provide sufficient detail (a description of the project and its relevance to the criteria) to substantiate the extent to which its client references satisfy the criteria.
- 4.2.2.4 Bidders are requested to provide a cross-reference list of the substantiations using Form 4 – Substantiation of Technical Compliance Cross-Reference List.
- 4.2.2.5 Bidders must include client references for each of the Mandatory Technical Criteria M.1 to M.6. Bidders are requested to submit references for M.1 to M.6 using the Client Reference Contact List for Mandatory Technical Criteria (Form 2).
- 4.2.2.6 Bidders should provide confidential client references on a separate CD-ROM or DVD from the Technical Bid clearly labelled Confidential Client List, if applicable.
- 4.2.2.7 The SSC evaluation team may contact each reference to verify the information provided in the proposal and may ask additional questions.
- 4.2.2.8 Canada reserves the right to contact the primary contact and, where applicable, the backup contact, in order to validate that the information cross-referenced in Form 4 is accurate.



Modification 010:

On Page 13 of 55 of the RFP, Section 4.2 Technical Evaluation, Subsection 4.2.2.3 Corporate References:

Delete in its entirety.

Modification 011:

On Page 14 of 55 of the RFP, Section 4.2 Technical Evaluation, Subsection 4.2.2.4 Client References:

Delete in its entirety.

Modification 012:

On Page 14 of 55 of the RFP, Section 4.2 Technical Evaluation, Subsection 4.2.3 Point-Rated Technical Criteria:

Add:

- 4.2.3.3 Bidders should substantiate for each Point Rated Technical Criteria R.1 to R.6 their claim that they fulfill the criteria by providing the required information as stated by the criteria. Bidders should provide sufficient detail (a description of the project and its relevance to the criteria) to substantiate the extent to which its references satisfy the criteria.
- 4.2.3.4 Bidders are requested to provide a cross-reference list of the substantiations using Form 4 – Substantiation of Technical Compliance Cross-Reference List.
- 4.2.3.5 Bidders should include client references for each of the Point Rated Technical Criteria R.1 to R.6. Bidders are requested to submit references for R.1 to R.6 using the Client Reference Contact List for Point Rated Technical Criteria (Form 3).
- 4.2.3.6 Bidders should provide confidential client references on a separate CD-ROM or DVD from the Technical Bid clearly labelled Confidential Client List, if applicable.
- 4.2.3.7 The SSC evaluation team may contact each reference to verify the information provided in the proposal and may ask additional questions.
- 4.2.3.8 Canada reserves the right to contact the primary contact and, where applicable, the backup contact, in order to validate that the information on the signed Form 4 is accurate.

Modification 013:

On Page 14 of 55 of the RFP, Section 4.2 Technical Evaluation, Subsection 4.2.3.4 Client References:

Delete in its entirety.



Modification 014:

On Page 15 of 55 of the RFP, Section 4.2 Technical Evaluation, Subsection 4.2.3.5 Corporate Information:

Delete in its entirety.

Modification 015:

On Page 15 of 55 of the RFP, Section 4.2.4 Reference Validation Checks, Subsections 4.2.4.2:

Delete in its entirety.

Insert: 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 e-mail, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days.

Modification 016:

On Page 15 of 55 of the RFP, Section 4.2.4 Reference Validation Checks, Subsections 4.2.4.3:

Delete in its entirety.

Insert: 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 5 working days will not be extended to provide additional time for the new contact to respond.

Modification 017:

On Page 33 of 55 of the RFP, Section 7.23 Transition Services at end of Contract Period:

Delete in its entirety.

Modification 018:

On Page 43 of 55 of the RFP, Attachment 4.1 – Technical Criteria:

Delete in its entirety.

Insert: See Attachment 4.1 below.

Modification 019:

On Page 50 of 55 of the RFP, Form 2 - Client Reference Verification Form for Mandatory Technical Criteria:

Delete in its entirety.



Insert: See Form 2 below.

Modification 020:

On Page 52 of 55 of the RFP, Form 3 - Client Reference Verification Form for Point-Rated Technical Criteria:

Delete in its entirety.

Insert: See Form 3 below.

Modification 021:

On Page 54 of 55 of the RFP, Form 4 - Substantiation of Technical Compliance Form:

Delete in its entirety.

Insert: See Form 4 below.



ATTACHMENT 4.1 – TECHNICAL CRITERIA

Substantiation of Technical Compliance

Note to Bidders: Read all of the following criteria in relation to size, scope and complexity of the work requirements described in Annex A – Statement of Work.

Only references of the Bidder themselves will be used for evaluation.

Unless otherwise indicated, client references provided for each technical criterion may be used in a separate technical criterion. For example, if References A, B, and C are used on M.1, they can also be used for M.2.

The Shared Services Canada (SSC) evaluation team may contact each reference to verify the information provided in the proposal and may ask additional questions.

1. Mandatory Requirements

Note that failure to provide the required information will result in a non-compliant proposal.

Wherever a client reference is requested in the mandatory requirements, the proposal **must** include client references.

Criteria ID	Criteria	Met / Not Met
M.1	<p>The Bidder must have delivered advisory services in support of the planning, designing and execution of information technology (IT) sourcing strategies where each project was valued at greater than \$500 million completed within the last seven (7) years, for three (3) distinct individual projects.</p> <p>The Bidder must substantiate their claim for each engagement. The engagement must include contract delivery and contract management activities.</p> <p>One (1) of the three (3) engagements must specifically relate to the delivery of an <u>IT outsourcing strategy</u>.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.2	<p>The Bidder must have delivered IT sourcing strategies to an organization that resides in a World Trade Organization signatory country, other than Canada where each project was completed within the last seven (7) years, for three (3) distinct individual projects.</p> <p>The Bidder must substantiate their claim for each engagement.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.3	<p>The Bidder must have delivered advisory services in support of the planning, designing and execution of IT benchmarking activities completed within the last seven (7) years, for three (3) distinct individual projects.</p> <p>The Bidder must substantiate their claim for each engagement. For the purposes of</p>	



Criteria ID	Criteria	Met / Not Met
	<p>this requirement, each engagement must be from an organization with a minimum of 5,000 employees.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.4	<p>The Bidder must have delivered IT benchmarking activities where each project was valued at greater than \$500,000 completed within the last seven (7) years, for three (3) distinct individual projects.</p> <p>The Bidder must substantiate their claim for each engagement.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.5	<p>The Bidder must have delivered services to transformation initiatives involving data centre consolidation, completed within the last seven (7) years, for two (2) distinct individual projects.</p> <p>The Bidder must substantiate their claim for each engagement. For the purposes of this requirement, each engagement must be for an organization with a minimum of 5,000 employees.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.6	<p>The Bidder must have completed the preparation of competitive procurement materials specific to all following items for Sourcing Agreements, within the last seven (7) years, for two (2) distinct individual projects:</p> <ul style="list-style-type: none"> a. Statement of Work/Requirements for Sourcing Agreement; b. Technical Evaluation Criteria and Process for Sourcing Agreement; c. Financial Evaluation Criteria and Process for Sourcing Agreement; d. Terms and Conditions of Sourcing Agreement; and e. Support for negotiation of contracts with prospective suppliers, including software contracts. <p>The Bidder must substantiate their claim for each engagement. For the purposes of this requirement, each engagement must be for an organization with a minimum of 5,000 employees.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.7	<p>The Bidder must have a physical office in at least three (3) continents.</p> <p>For the purposes of this criteria, the continents are defined as follows:</p> <ul style="list-style-type: none"> - North America; - South America; - Europe; - Asia; - Africa; and - Australia. <p>The Bidder must provide the address and contact name for a minimum of</p>	



Criteria ID	Criteria	Met / Not Met
	three (3) offices.	
M.8	<p>The Bidder must demonstrate a “bench-strength” consisting of a minimum of fifty (50) existing qualified employees available to provide the advisory sourcing and benchmarking services required to meet the requirements as described in Annex A – Statement of Work.</p> <p>The Bidder must provide a table containing the following information for each existing employee:</p> <ol style="list-style-type: none">1. Name2. Title3. Educational Degree / Certification4. Number of years as an employee with the Bidder5. Years of Experience6. Domain of relevance: Sourcing or Benchmarking	
M.9	<p>The Bidder must demonstrate a corporate approach to tools, methodology and the existence of a vendor/market intelligence database used in the development and delivery of sourcing strategies and benchmarking activities.</p> <p>The proposal must provide a description with sufficient detail to substantiate the extent to which the Bidder’s methodology and approach addresses the following elements:</p> <ol style="list-style-type: none">a. Sources of information and best practices;b. The extent to which the knowledge base captures the Bidder’s global experience;c. Regular updating of the knowledge base;d. Regular updating of price information related to IT sourcing requirements; ande. Acquisition of information and best practices from a “practitioner” vs. a “research” point of view.	



2. Point Rated Requirements

Note that failure to provide the required information will result in a score of zero.

Criteria ID	Criteria	Maximum Points Available
R.1	<p>The Bidder should have delivered consulting services for engagements completed within the last seven (7) years where each individual consulting engagement had a value of greater than \$20 million. The value of the engagement refers to the “contract value” of the engagement between the Bidder and its client, and not the value of the project that was undertaken by the Bidder’s client.</p> <p>Twenty (20) points will be awarded for each completed engagement with substantiation and client reference, up to a maximum of five (5) engagements.</p>	100
R.2	<p>The Bidder should have delivered IT outsourcing services for engagements completed within the last seven (7) years where the services were provided for organizations with more than 10,000 employees.</p> <p>Ten (10) points will be awarded for each completed engagement with substantiation and client reference, up to a maximum of ten (10) engagements.</p>	100
R.3	<p>The Bidder should have delivered services for data centre consolidation engagements completed within the last seven (7) years where the services were provided for organizations with more than 5,000 employees AND each engagement resulted in the consolidation of at least three (3) data centers.</p> <p>Ten (10) points will be awarded for each completed engagement with substantiation and client reference, up to a maximum of ten (10) engagements.</p>	100
R.4	<p>The Bidder should have delivered IT benchmarking services for engagements completed within the last seven (7) years where the services were provided for organizations with more than 5,000 employees.</p> <p>Ten (10) points will be awarded for each completed engagement with substantiation and client reference, up to a maximum of ten (10) engagements.</p>	100
R.5	<p>The Bidder should have delivered IT consulting services for engagements completed within the last seven (7) years in addition to any previously stated references in the Mandatory Requirements where the value of each engagement was greater than \$20 million. The value of the engagement refers to the “contract value” of the engagement between the Bidder and its client, and not the value of the project that was undertaken by the Bidder’s</p>	100



Criteria ID	Criteria	Maximum Points Available
	<p>client.</p> <p>The engagements must be different from those provided in response to any Mandatory or other Point-Rated Requirements.</p> <p>Twenty (20) points will be awarded for each completed engagement with substantiation and client reference, up to a maximum of five (5) engagements.</p>	
R.6	<p>The Bidder should have delivered IT sourcing and benchmarking services completed within the last seven (7) years in support of large, high-profile transformation initiatives that include data centre and telecommunications consolidations of substantive size and similar scope and complexity to those described in Annex A - SOW, and where the project value was over \$1 billion.</p> <p>One hundred (100) points will be awarded for each project with substantiation and client reference, up to a maximum of five (5) projects.</p>	500



**FORM 2
CLIENT REFERENCE CONTACT LIST
FOR MANDATORY TECHNICAL CRITERIA**

Mandatory Technical Criteria	Client Reference Number	Client Reference (Company Name)	Contact Name	Title	Email
M.1	1				
	2				
	3				
M.2	1				
	2				
	3				
M.3	1				
	2				
	3				
M.4	1				
	2				
	3				
M.5	1				
	2				
M.6	1				
	2				



**FORM 3
CLIENT REFERENCE CONTACT LIST
FOR POINT RATED TECHNICAL CRITERIA**

Point Rated Technical Criteria	Client Reference Number	Client Reference (Company Name)	Contact Name	Title	Email
R.1	1				
	2				
	3				
	4				
	5				
R.2	1				
	2				
	3				
	4				
	5				
	6				
	7				
	8				
	9				
	10				
R.3	1				
	2				
	3				
	4				
	5				
	6				
	7				
	8				
	9				
	10				
R.4	1				
	2				
	3				
	4				
	5				
	6				
	7				
	8				
	9				
	10				
R.5	1				
	2				
	3				
	4				
	5				
R.6	1				
	2				
	3				
	4				
	5				



**FORM 4
SUBSTANTIATION OF TECHNICAL COMPLIANCE
CROSS-REFERENCE LIST**

Mandatory Technical Criteria	Engagement/Project Number	Reference to Substantiating Materials included in Bid (Title, Page and reference number)
M.1	1	
	2	
	3	
M.2	1	
	2	
	3	
M.3	1	
	2	
	3	
M.4	1	
	2	
	3	
M.5	1	
	2	
M.6	1	
	2	
M.7	1	
	2	
	3	
M.8	n/a	
M.9	n/a	

Point Rated Technical Criteria	Engagement/Project Number	Reference to Substantiating Materials included in Bid (Title, Page and reference number)
R.1	1	
	2	
	3	
	4	
	5	
R.2	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
	10	
R.3	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	



	10	
R.4	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
	10	
R.5	1	
	2	
	3	
	4	
	5	
R.6	1	
	2	
	3	
	4	
	5	