



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

Contracting Officer : Solinda Phan
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 | Secure Channel Division
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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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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. – 007
Client Reference No. – N° référence du client 13-1620	Date October 8, 2013
File No. – N° de dossier CAC10031544	
Solicitation Closes – L'invitation prend fin at – à 11 :59 PM on – le October 18, 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, Solicitation Amendment 003, Attachment 4.1 – Technical Criteria, Forms 2 and 3, and Annex C – SRCL and Security Guide.

Canada acknowledges that there are a few more questions to be addressed in a subsequent amendment.

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:

1. Yes, vendors are able to use global resources.
2. Resources will be assessed at the Task Authorization stage. Please refer to Annex A - SOW, Appendix A - Task Authorization Procedures.
3. See Amendment 003, response to Question 6. See Modifications 023 and 030.

Question 26:

Would SSC currently have a rough estimate as to the limitation of expenditure for this requirement. Currently, the way in which the RFP is structured, SSC can expect to receive a wide variety of price points in relation to the financial proposal. We understand that the Crown would not want to make any financial commitments to bidders at this time, but a little guidance will assist market in determining the scope of the requirement, even if this is through an “estimated limitation of expenditure”.

Answer 26:

No. Canada will not provide the requested information.

Question 31:

Are security clearances required to be submitted with the bid or only prior to award of a contract?

Answer 31:

Security clearances are required to be submitted before award of a contract. However, should Bidders already have the required security clearance it can be submitted with the bid submission.

See Modification 022.

Question 36:

The current contract security terms pose a significant barrier to participation in the RFP process. The unique and niche skill of advising leading organizations on IT strategy of the scale and complexity if SSC is not a widely available skill and companies who specialize in it are unlikely to have centralized their talent pool or facilities within Canada. Canada-specific restrictions placed on vendors for all requirements considerably reduces the talent pool of individuals who can support this requirement and may (as is the case with our firm) preclude them from submitting a bid altogether. Should the Crown want to solicit bids



from vendors with a skill set and track record demonstrating their ability to meet your requirements, this is an area that must be reviewed to reduce the currently proposed barriers to participation.

We believe that there are a number of ways that the Crown can modify the security requirements to allow greater vendor participation. We have provided some examples of how the Crown could reduce the barriers to participation, while still maintaining Canada's secrets and data secure.

- Provide a clear articulation of the security level required for each activity (code review, data review, etc...), noting the specific activities that require a Secret level clearance
- Evaluate Citizenship requirements and limit the Citizenship requirements to be only for those specific activities that your security organization deems Canadian eyes-only.
- Confirm that foreign nationals can obtain clearances that will be acceptable and comparable to Canadian Secret clearance. The Crown should also institute a process to assist in the clearance of foreign nationals who are part of the successful bid team.

Answer 36:

See Amendment 003, response to Question 6 regarding Foreign equivalent security clearances.

See response to Question 11.

See Modifications 023 and 030.

Question 46:

Attachment 4.1 – 2.1 Client References:

R1 (pg 46) – Strategic consulting engagements are focused in time and on strategic elements of a business and therefore don't extend over many months, as such they are unlikely to be \$20,000,000 or more in cost. Therefore, we ask that SSC reduce the minimum value to \$10,000,000.

R5 (pg 46) – Strategic consulting engagements are focused in time and on strategic elements of a business and therefore don't extend over many months, as such they are unlikely to be \$20,000,000 or more in cost. Therefore, we ask that SSC reduce the minimum value to \$10,000,000.

R6 (pg 47) – There are a limited number of out sourcing relationships valued at over \$1 billion, and industry is moving towards cloud and other lower cost services that don't make the \$1 billion threshold, therefore ask that SSC reduce the value of the outsource contract to \$250 million

Answer 46:

R1 (p46) – Canada will not make the requested change.

R5 (p46) – Canada will not make the requested change.

R6 (p47) – See Modification 027.

Question 53:

Page 5 of 55 Section 1.2 Summary

The third paragraph states:

“On July 12, 2012, the Government of Canada announced on the Government Electronic Tendering Service that it had invoked the National Security Exception under the trade agreements in respect of procurements related to email, networks and data centres for Shared Services Canada. As a result, this requirement is subject to the National Security Exception”

Given that SSC has invoked the National Security Exception that covers this requirement, our understanding is that this might include requirements such as:

- all facilities must be in Canada,
- data must be processed in Canada,
- certain personnel must be Canadian citizens, and
- equipment must be manufactured in certain countries

Can SSC please clarify how these requirements affect this bid solicitation? Must all of the bidder's facilities be in Canada? Does all of the bidder's analysis related to sourcing and benchmarking have to be completed in Canada? Do all of the Bidder's personnel engaged in the work for SSC have to be Canadian citizens?

Answer 53:

Notwithstanding that SSC has invoked the National Security Exception under the trade agreements in respect of procurements related to email, networks and data centres, this specific solicitation stipulates the following changes:

- The Bidder's facility does not need to be in Canada;
- The Bidder's personnel do not have to be Canadian citizens; and
- The data must be processed in Canada and equipment must be manufactured in certain countries is not relevant to the requirements identified in this RFP.

The Bidder's facility does not need to be in Canada nor do the Bidder's personnel have to be Canadian citizens. As per RFP Section 7.6, Canada will accept 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).

The location of work for the analysis related to sourcing and benchmarking will be identified on the Task Authorization. The Work described in Annex A - SOW does not have to be completed in Canada. However, as noted in Section 8 of Annex A – Statement of Work, the Contractor may be required to access to SSC network or attend meetings, briefings and conduct research at various locations throughout the National Capital Region (Ottawa, Ontario and Gatineau, Quebec).

Question 64:

We see on page 6 of 55 of the RFP document that SSC has included the "Restriction for Future Related Work". Given the scope of work for this requirement, as well as the future requirements SSC may have in the foreseeable future, we assume that this restriction applies only to the competitive outsourcing procurements coming out in support of the five transformation programs, identified within the RFP document, including and limited to:

1. Email Transformation Initiative
2. Data Centre Consolidation Program
3. Telecommunications Transformation Program
4. Cyber and Information Technology Security (CITS) Transformation
5. Managed Workplace Devices

Please confirm our assumption is correct.

Answer 64:

The Restriction for Future Related Work is not limited to the projects stated in the RFP. The Restriction for Future Related Work applies to all future competitive solicitations where the Contractor, parent and affiliated companies, any of its subcontractors, any of their respective employees or former employees, has been involved in any manner in the preparation of those solicitations, or has had access to information related to those solicitations that is not available to other bidders and that would give or appear to give unfair advantage.



Question 67:

RFP Amendment 1 – Page 3 Modification 3. With regards to R.6, which requires projects with a value over \$1 billion, we would like to request that the requirement be changed to “annual service charges in excess of \$100M”. As a leading sourcing advisor rated by (International Association of Outsourcing Professionals (IAOP), our extensive experience would suggest that a far more representative measure of scope and complexity is the annual service charge (ASC) versus total contract value (TCV). When we look at the landscape today for sourcing, many contracts are not reaching maturity and are being renegotiated early and for shorter durations. The \$1B TCV deal is extremely rare and in fact longer term deals, which typically drive large TCV i.e. greater than a \$1B, would not be recommended based on industry leading practices. We assume that the \$1B request is to confirm the Suppliers experience and ability to manage projects that are similar in size, scope and complexity, and therefore the ASC would be a more accurate indicator of advisory experience and capability.

Answer 67:

See response to Question 46.

Question 68:

In Amendment 3, and in response to Question 7, SSC made a number of modifications to Section 3.2 Section I: Technical Bid, Subsection 3.2.2.3 Customer Reference Contact Information. While we appreciate that SSC may view this as relaxing the requirement, the reference requirement still poses a tremendous challenge. Many clients restrict us from directly identifying them or their employees in customer credentials for RFP responses and published case studies – and would prohibit us from sharing that information on a disc marked “confidential” as suggested in the amendment.

We have agreements in place to use credentials from a number of our clients for this RFP, but we are restricted to using generic references for many. We are permitted by clients, as are most firms, to provide a detailed description of the project under a generic name (e.g. multi-national pharmaceutical company, or State Revenue Agency), and these references will be approved by the client prior to publication. We will certify the authenticity and accuracy of the information regarding these credentials in our RFP response.

If SSC will not remove the requirement for named references and client contacts, we unfortunately will be precluded from bidding as not all our references can be named. Since no references were required for the two previous RFPs for Business and Technical Services and PMO Services, and as this requirement will preclude our firm and likely others from bidding, would Canada please remove the requirement for named client references and contacts, and allow for generic references?

Answer 68:

Canada will not make the requested change. See Modification 024, 025, 026, 028, 029.

Question 72:

With regards to the requirement for bidders to “provide a client reference for each substantiated engagement.” For bidders to use a client reference, client approval is required from senior levels. Many of our projects that we reference will be for private sector clients who, for confidentiality and security reasons, do not wish their name and contact information to be released. We request that the Crown give the option for certain confidential projects the client name and contact information can be replaced by the proposing bidder’s Lead Engagement Partner name and contact information who can then put the Crown in touch directly with the client.

Answer 72:

Canada will not make the requested change. See response to Question 68.

Question 73:



We submitted questions on September 13 and subsequent dates which have not yet been answered by the Crown. In addition, Amendment 3 had several questions for which answers were to be provided through an amendment to come. As we have not received an amendment to date, we would like to request an extension to the closing date to allow sufficient time for the Crown to provide answers, and also allow time for the Vendors to incorporate the answers into our response. If the closing date remains October 4, and the question and answer amendment results in the requirement to request clarification on points, Vendors would not have the opportunity to request clarification as questions 10 calendar days before closing. (September 24)

We submitted questions on September 13 and subsequent dates and are awaiting a response from the Crown. In addition, in the Crown's Amendment 3 response, it was noted that for questions posed but not yet answered, responses would be provided at a later date via future amendments. As we have not received any subsequent amendments to date, we would like to request an extension to the closing date to allow sufficient time for the Crown to provide answers, and also allow time for us and other proponents to incorporate the answers into our responses. Should the Crown provide amendments between tomorrow's date and the existing closing, based on procurement protocol, we would be unable to seek clarification on any amendments.

We are seeking clarity on how the Task Authorizations will be utilized for this contract. Will the TA's be based on deliverables or to requests individual resources by the categories and skill levels specified in the RFP. A deliverable based approach would allow for the supplier to assign appropriate resources / levels to achieve the desired outcomes.

Answer 73:

See Amendment 005.

Task Authorizations will be based on individual resources by the categories and skill levels, as outlined in Section 7.2 of Part 7 of the RFP.



Modification 022

On Page 21 of 55 of the RFP, Section 6.1 Security Requirement, Subsection 6.1.1.2:

Delete in its entirety.

Modification 023

On Page 25 of 55 of the RFP, Section 7.5 Security Requirement, Subsection 7.5.1

Delete in its entirety.

Insert:

- 7.5.1.1 The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid **Facility Security Clearance at the level of SECRET**, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- 7.5.1.2 The Contractor/Offeror personnel requiring access to **PROTECTED/CLASSIFIED** information, assets or sensitive work site(s) **must EACH hold a valid RELIABILITY STATUS or SECRET clearance**, as required, granted or approved by CISD/PWGSC.
- Until the security screening of the Contractor personnel required by this Contract has been completed satisfactorily by the CISD, PWGSC, the Contractor personnel **MAY NOT HAVE ACCESS** to (CLASSIFIED/PROTECTED) information or assets, and **MAY NOT ENTER** sites where such information or assets are kept, without an **escort**.
- 7.5.1.3 The Contractor/Offeror **MUST NOT** remove any **PROTECTED/CLASSIFIED** information from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
- 7.5.1.4 Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of CISD/PWGSC.
- 7.5.1.5 The Contractor/Offeror must comply with the provisions of the:
- (a) Security Requirements Check List and security guide, attached at Annex C
 - (b) *Industrial Security Manual* (Latest Edition).

Modification 024

On Page 8 of 21 of the Solicitation Amendment 003, Modification 006, Section 3.2 Section I: Technical Bid, Subsections 3.2.2.3.3, 3.2.2.3.4 and 3.2.2.3.5:

Delete in its entirety.

Insert:

- 3.2.2.3.3 For each client reference, the Bidder must, at a minimum, provide the name and either the phone number or email address for a contact person. Bidders are also requested to also include the company name and 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 client reference specifically requests to have their company information kept confidential without a pre-existing confidentiality/non-disclosure agreement between the Bidder and the client reference, the Bidder may provide the reference on a separate CD-ROM or DVD from the Technical Bid clearly labelled Confidential Client Reference. After the solicitation closes



the Contracting Authority will remove and secure the Confidential Client Reference CD-ROM or DVD from the Technical Bid.

- 3.2.2.3.5 If the Bidder is restricted from disclosing the client reference’s company information due to security and/or obligations under a pre-existing confidentiality/non-disclosure agreement between the Bidder and the client reference, the Bidder may provide a contact name and either the phone number or email address of that contact on Forms 2 and/or 3. The Bidder should insert Confidential Client under the column labelled “Client Reference (Company Name)”, where/if applicable.
- 3.2.2.3.6 Bidders must ensure that their client references agree to have their company name disclosed either through the Bidder’s proposal on Forms 2 and/or 3 or disclose it themselves verbally during a validation check by a phone call from SSC personnel. Should the client reference’s company name not be provided, the Bidder will be non-compliant.
- 3.2.2.3.7 Crown references will be accepted.

Modification 025

On Page 9 of 21 of the Solicitation Amendment 003, Modification 009, Section 4.2 Technical Evaluation, Subsection 4.2.2.6:

Delete in its entirety.

Insert: Bidders may provide confidential client references on a separate CD-ROM or DVD from the Technical Bid clearly labelled Confidential Client List or provide the contact name and number on Form 2, if applicable.

Modification 026

On Page 10 of 21 of the Solicitation Amendment 003, Modification 012, Section 4.2 Technical Evaluation, Subsection 4.2.3.6:

Delete in its entirety.

Insert: Bidders may provide confidential client references on a separate CD-ROM or DVD from the Technical Bid clearly labelled Confidential Client List or provide the contact name and number on Form 3, if applicable.

Modification 027

On Page 17 of 21 of the Solicitation Amendment 003, Modification 018, Attachment 4.1 – Technical Criteria, R6:

Delete in its entirety.

Insert:

Criteria ID	Criteria	Maximum Points Available
R.6	The Bidder should demonstrate that the vendor has provided these IT sourcing and benchmarking services completed within the last seven (7) years in support of large, high-profile transformation initiatives that include	500



	<p>data centre and telecommunications consolidations of substantive size and similar scope and complexity to those described herein, and where:</p> <p>a. The transformation initiative resulted in an outsourcing contract value in excess of \$1 billion, or</p> <p>b. The transformation initiative resulted in an outsourcing contract value in excess of \$100M for annual service charges for a minimum of 5 consecutive years.</p> <p>One hundred (100) points will be awarded for each project up to a maximum of five (5) projects.</p>	
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Modification 028

On Page 18 of 21 of the Solicitation Amendment 003, Form 3 - Client Reference Verification Form for Point-Rated Technical Criteria:

Delete in its entirety.

Insert: See Form 2 below.

Modification 029

On Page 19 of 10 of 21 of the Solicitation Amendment 003, Form 4 - Substantiation of Technical Compliance Form:

Delete in its entirety.

Insert: See Form 3 below.

Modification 030

Annex C – SRCL and Security Guide of the RFP:

Add: See the attached updated Annex C.



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

Mandatory Technical Criteria	Client Reference Number	Client Reference (Company Name)	Contact Name	Title	Email	Phone 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					



**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	Phone 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					