

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

Michelle Beaton
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Services partagés Canada | Shared Services
Canada

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**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

Proposal To: Shared 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 thereof.

Proposition aux: Services partagés 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-annexées, au(x) prix indiqué(s).

Comments - Commentaires

This document contains a Security Requirement / Ce document contient un besoin de sécurité

Title – Sujet SSC MARKET STUDY / SPC ÉVALUATION DU MARCHÉ	
Solicitation No. – N° de l'invitation 10034308	Date 9 Dec 2013
Client Reference No. – N° référence du client	
File No. – N° de dossier	
Solicitation Closes – L'invitation prend fin at – à 11 :59 PM on – le 17 Jan 2014	Time Zone Fuseau horaire Eastern Standard Time (E ST) / Heure Normale de l'Est (HNE)
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Inquiries to : - Adresser toutes questions à: Michelle Beaton	
Telephone No. – N° de téléphone : 613-240-6650	Email – Courriel michelle.beaton@ssc-spc.gc.ca
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 _____

REQUEST FOR PROPOSAL MARKET STUDY FOR SHARED SERVICES CANADA

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List of Annexes to the Resulting Contract:

Annex A	Statement of Work Appendix A to Annex A – Task Authorization Procedures Appendix B to Annex A – Task Authorization Request and Acceptance Form Appendix C to Annex A – Certifications at the Task Authorization Stage
Annex B	Basis of Payment
Annex C	Security Requirements Check List
Annex D	Federal Contractors Program for Employment Equity – Certification

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

Attachment 3.1: Pricing Tables

List of Attachments to Part 4 (Evaluation Procedures and Basis of Selection):

Attachment 4.1: Technical Criteria

Forms:

- Form 1 – Bid Submission Form
- Form 2 – Client Reference Verification Form for Mandatory Technical Criteria
- Form 3 – Client Reference Verification Form for Point-Rated Technical Criteria
- Form 4 – Substantiation of Technical Compliance Cross-Reference List
- Form 5 – Code of Conduct Certification Form

REQUEST FOR PROPOSAL MARKET STUDY FOR SHARED SERVICES CANADA

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;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The annexes include the Statement of Work and its appendices, Basis of Payment, Security Requirements Checklist, Federal Contractors Program for Employment Equity – Certification, and Insurance Requirements.

1.2 Summary

SSC requires the expert services of a market research firm to support its market analysis activities. The objective of this requirement is to award one contract to acquire market research and analysis, and related services to support ongoing SSC and GC transformation activities on an 'as-and-when' requested basis.

This bid solicitation is being issued by SSC. It is intended to result in the award of a contract for 1 year plus two (2) irrevocable one-year options allowing Canada to extend the term of the contract. This bid solicitation does not preclude Canada from using another method of supply for entities of the Government of Canada with the same or similar needs.

There is a security requirement associated with this requirement. For additional information, see Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. Bidders should consult the "Security Requirements on PWGSC Bid Solicitations - Instructions for Bidders" document on the Departmental Standard Procurement Documents website (<http://www.pwgsc.gc.ca/acquisitions/text/plain/plain-e.html#top>).

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), 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 (CCoIFTA), the Canada-Panama Free Trade Agreement (CPanFTA) if it is in force, and the Agreement on Internal Trade (AIT).

Bidders must provide a list of names, or other related information as needed, pursuant to section 01 of Standard Instructions 2003 or 2004, whichever is applicable to this bid solicitation.

For services requirements, Bidders in receipt of a pension or a lump sum payment must provide the required information as detailed in article 3 of Part 2 of the bid solicitation.

There is a Federal Contractors Program (FCP) for employment equity requirements associated with this procurement: see Part 5 – Certifications, Part 7 – Resulting Contract Clauses and the annex named Federal Contractors Program for Employment Equity – Certification.

1.3 Restriction for Future Related Work

The Contractor selected through this procurement will support the planning and development of subsequent competitive procurements for the execution of transformation projects within the scope of the SSC transformation programs, as outlined in Annex A – Statement of Work. As a result, this Contractor may be given information during the completion of the Contract which could give them an unfair advantage for subsequent competitive procurements.

To remove any possibility for future conflict of interests, the Contractor, parent and affiliated companies, and subcontractors will be disqualified from any future competitive solicitation(s) which are developed under the scope of the resulting Contract.

1.4 Debriefings

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

- 2.1.1 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.
- 2.1.2 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.
- 2.1.3 The 2003 (2013-06-01) 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. All references to PWGSC contained within the Standard Instructions will be interpreted as a reference to SSC.
- 2.1.4 Section 3 of the Standard Instructions – Goods and Services – Competitive Requirements 2003 is amended as follows: delete “Pursuant to the *Department of Public Works and Government Services Act*, S.C. 1996, c.16.” 2.1.5 Subsection 5(4) of 2003, Standard Instructions - Goods or Services - Competitive Requirements is amended as follows:
- a) Delete: sixty (60) days
 - b) Insert: one hundred eighty (180) days
- 2.1.5 Section 7 is replaced by the following:
1. A bid delivered to the specified address after the closing date and time but before the contract award date may be considered, provided the bidder can prove the delay is due solely to a delay in delivery that can be attributed to a Delivery Service Company. Delivery Company means an incorporated courier company, Canada Post Corporation, or a national equivalent of a foreign country. The only pieces of evidence relating to a delay that are acceptable are:
 - a) a cancellation date stamp; or
 - b) a courier bill of lading; or
 - c) a date stamped labelthat clearly indicates that the bid was received by the Delivery Company before the bid closing date.
 2. Postage meter imprints, whether imprinted by the Bidder or the Delivery Company are not acceptable as proof of timely mailing.
- 2.1.6 For purposes of this procurement, the PWGSC policies referenced within the Standard Acquisitions Clauses and Conditions Manual are adopted as SSC policies.

2.2 Submission of Bids

- 2.2.1 Bids must be mailed to Shared Services Canada by the date, time, and place indicated on page 1 of the bid solicitation.
- 2.2.2 Due to the nature of the bid solicitation, bids delivered by hand or transmitted electronically or by facsimile will not be accepted.
- 2.2.3 Vendors intending to submit a bid are requested to notify the Contracting Authority by email (email address can be found on page 1 of the solicitation document), prior to the bid closing date, indicating their intention to submit a bid.

2.3 Former Public Servant

- 2.3.1 Contracts awarded to 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 the spending of public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below before contract award.

2.4 Definitions

For the purposes of this clause, "former public servant" is any 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. A former public servant may be:

- a) an individual;
- b) an individual who has incorporated;
- c) a partnership made of former public servants; or
- d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"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 size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"Pension" means 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 [Canada Pension Plan Act](#), R.S., 1985, c.C-8.

2.5 Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes** () **No** ()

If so, the Bidder must provide the following information, for all FPS in receipt of a pension, as applicable:

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

2.6 Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes** () **No** ()

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

2.7 Enquiries - Bid Solicitation

- 2.7.1 All enquiries must be submitted in writing to the Contracting Authority no later than 14 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- 2.7.2 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.

2.8 Applicable Laws

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

<p>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.</p>

2.9 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.

PART 3 BID PREPARATION

3.1 BID PREPARATION INSTRUCTIONS

3.1.1 Copies of Bid: Canada requests that bidders provide their bid in separately bound sections as follows:

3.1.1.1 Section I: Technical Bid

3.1.1.1.1 Form 1: One (1) hardcopy of the signed and completed Bid Submission Form (Form 1).

3.1.1.1.2 CD-ROMs or DVDs containing the bidder's complete technical proposal in Adobe PDF compatible format. The disks should be clearly labelled on their face as follows:

3.1.1.1.2.1 The Bidder's name;

3.1.1.1.2.2 The solicitation number;

3.1.1.1.2.3 "Technical Proposal"; and

3.1.1.1.2.4 The signature of the authorized representative of the Bidder.

3.1.1.1.3 CD-ROMs or DVDs 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.

3.1.1.2 Section II: Financial Bid: The Financial Bid should be provided in a sealed envelope containing the following:

3.1.1.2.1 One (1) hardcopy of the complete financial proposal.

3.1.1.2.2 One (1) CD-ROM or DVD containing the complete financial proposal in Microsoft Excel compatible format. The disk should be clearly labelled on the face as follows:

3.1.1.2.2.1 The Bidder's name;

3.1.1.2.2.2 The solicitation number;

3.1.1.2.2.3 "Financial Proposal"; and

3.1.1.2.2.4 The signature of the authorized representative of the Bidder.

3.1.1.2.3 If there is a discrepancy between the wording of the softcopy and the hardcopy, the wording of the hardcopy will have priority over the wording of the softcopy.

3.1.1.3 Section III: Certifications: One (1) hardcopy of any required certifications.

3.1.1.4 Section IV: Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

3.1.2 Format for Bid: Canada requests that bidders follow the format instructions described below in the preparation of their bid:

3.1.2.1 Use 8.5 x 11 inch (216 mm x 279 mm) paper;

3.1.2.2 Use a numbering system that corresponds to the bid solicitation;

3.1.2.3 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

3.1.2.4 Include a table of contents.

3.1.3 Submission of Only One Bid from a Bidding Group:

3.1.3.1 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 provide the Bidder with two (2) working days to identify one bid to be considered in this competition. Failure to meet this deadline will result in all the bids being declared set-aside.

3.1.3.2 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:

3.1.3.2.1 they are the same legal entity (i.e. the same natural person, corporation, partnership, limited liability partnership, etc.);

3.1.3.2.2 they are "related persons" or "affiliated persons" according to the *Canada Income Tax Act*;

3.1.3.2.3 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

3.1.3.2.4 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

3.2.1 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.

3.2.2 The technical bid consists of the following:

3.2.2.1 **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 and the Bidder's Procurement Business Number, 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.

3.2.2.2 **Approach Document:** An Approach Document of a maximum of 20 pages single spaced font Times New Romans 11 must be provided as part of the technical bid. Any pages beyond the page limit (in sequential order) will not be evaluated. This document must substantiate the compliance of the Bidder and its proposed approach with the specific articles of Attachment 4.1 – Technical Criteria. 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 declared non-responsive and disqualified or rated accordingly.

3.2.2.3 Corporate Experience: Where the bid must include a description of previous projects; (i) a project must have been completed by the Bidder itself (and cannot include the experience of any proposed subcontractor or any affiliate of the Bidder); (ii) a project must have been completed by the bid closing date; (iii) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and (iv) if more similar projects are provided than requested, Canada will decide in its discretion which projects will be evaluated.

3.2.2.4 Customer Reference Contact Information:

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

3.2.2.4.2 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 customer and who is willing to act as a customer reference.

3.2.2.4.3 Crown references will be accepted.

3.2.2.5 Additional Elements (Value Added)

3.2.2.5.1 Where the Technical Evaluation Criteria refer to additional elements, all additional elements described in the bid will be included as mandatory contract requirements in the final contract. All additional elements must be provided at no additional cost to the Crown.

3.2.2.6 Substantiation of Technical Compliance Cross-Reference Form:

3.2.2.6.1 The Bidder must reference where in the bid the substantiation for each technical criterion 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. For this purpose, bidders may use form 4.

3.2.2.7 Security Requirements: As required by Part 6 of the bid solicitation.

3.3 Section II: Financial Bid

3.3.1 Pricing: Bidders must submit their financial bid in accordance with the pricing tables detailed in Attachment 3.1 - Pricing Tables. The total amount of Applicable Taxes must not be included. 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.

3.3.2 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.

3.3.3 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.

3.3.4 **Exchange Rate Fluctuation:** The requirement does not provide for exchange rate fluctuation protection. Any request for exchange rate fluctuation protection will not be considered and will render the bid non-responsive.

3.3.5 **Prices Not to Exceed:** Where the Pricing Tables indicate that the price or rate cannot exceed a set amount, if a Bidder exceeds the amount indicated, the bid will be declared non-responsive.

3.4 **Section III: Certifications**

Bidders must submit the certifications required under Part 5.



PART 4 EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- 4.1.1 Bids will be assessed in accordance with the entire requirement of the bid solicitation including the 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.
- 4.1.2 An evaluation team composed of representatives of Canada will evaluate the bids. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- 4.1.3 In addition to any other time periods established in the bid solicitation:
- 4.1.3.1 **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have two (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.
- 4.1.3.2 **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:
- 4.1.3.2.1. verify any or all information provided by the Bidder in its bid; OR
- 4.1.3.2.2. 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 two (2) working days of a request by the Contracting Authority.
- 4.1.3.3 **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

- 4.2.1 For the Technical Criteria, where references are required, Government of Canada (GC) clients may be used as references. Canada will use the same process for verifying reference information from GC references as for private sector or other public sector references used by the Bidder. Canada will not be responsible for obtaining the required reference information from any GC client used as a reference.
- 4.2.2 **Mandatory Technical Criteria:**
- 4.2.2.1 Each bid will be reviewed to determine whether it meets the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically 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.
- 4.2.2.2 The mandatory requirements are described in Attachment 4.1 – Technical Criteria.
- 4.2.2.3 Bidders are requested to provide a cross-reference list of the substantiations using Form 4 – Substantiation of Technical Compliance Cross-Reference List.



- 4.2.2.4 Bidders are requested to submit references using the Client Reference Contact List for Mandatory Technical Criteria (Form 2).
- 4.2.2.5 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.
- 4.2.2.6 The SSC evaluation team may contact each reference to verify the information provided in the bid.
- 4.2.2.7 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.

4.2.3 Point-Rated Technical Criteria:

- 4.2.3.1 Bids that meet all the Mandatory Technical Criteria will then be evaluated and scored under the Point-Rated Technical Criteria.
- 4.2.3.2 Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word “rated” or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.
- 4.2.3.3 The rated requirements are described in Attachment 4.1 – Technical Criteria.
- 4.2.3.4 Bidders should substantiate for each Point Rated Technical Criterion their claim that they fulfill the criterion by providing the required information as stated by the criterion. Bidders should provide sufficient detail to substantiate the extent to which it satisfies the criterion.
- 4.2.3.5 Bidders are requested to provide a cross-reference list of the substantiations using Form 4 – Substantiation of Technical Compliance Cross-Reference List.
- 4.2.3.6 Bidders are requested to submit references using the Client Reference Contact List for Point Rated Technical Criteria (Form 3).
- 4.2.3.7 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.
- 4.2.3.8 The SSC evaluation team may contact each reference to verify the information provided in the bid.
- 4.2.3.9 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.
- 4.2.3.10 The Total Technical Score of a bid = sum of the score obtained for each Point-Rated Technical Criterion for the bid.

4.2.4 Reference Validation Checks:

- 4.2.4.1 Canada reserves the right to perform customer reference validation checks. For reference validation checks, Canada will conduct the reference validation check in writing by email. Canada will send all email reference validation check requests to contacts supplied by all the Bidders, within 2 federal government working days, 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 e-mail was sent.
- 4.2.4.2 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 five (5) working days.



- 4.2.4.3 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.
- 4.2.4.4 Where Canada does not receive confirmation from either the primary contact or backup contact for the reference for the Mandatory Technical Criteria, the Bidder's bid will be declared non-responsive.
- 4.2.4.5 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.
- 4.2.4.6 Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the customer reference states he or she is unable or unwilling to provide the information requested, or (2) the customer reference 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 or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.
- 4.2.4.7 Whether or not to conduct reference checks is discretionary. However, if SSC 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.
- 4.2.5 **Technically Responsive Bid:** A technically responsive bid is one that complies with the mandatory requirements of this bid solicitation and meets all mandatory evaluation criteria.
- 4.3 **Financial Evaluation**
- The financial evaluation will be conducted by calculating the Total Evaluated Price using the Pricing Tables completed by the bidders in Attachment 3.1 Pricing Tables.
- 4.3.1 The price of the bid will be evaluated in Canadian dollars, the Goods and Services Tax or the Harmonized Sales Tax excluded, FOB destination, Canadian customs duties and excise taxes included.
- 4.3.2 **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:
- 4.3.2.1 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;



- 4.3.2.2 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
- 4.3.23 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.
- 4.3.2.4 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**

4.4.1 To be declared responsive, a bid must:

- i. comply with all the requirements of the bid solicitation;
- ii. meet all mandatory criteria; and
- iii. obtain a minimum 60% on the technical evaluation score.

Bids not meeting i, ii, and iii) above will be declared non-responsive.

- 4.4.2 The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 80% for the technical merit and 20% for the price.
- 4.4.3 To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 80%.
- 4.4.4 To establish the pricing score, each responsive bid will be prorated against the lowest Total Evaluated Price and the ratio of 20%.
- 4.4.5 For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
- 4.4.6 Neither the responsive bid obtaining the highest technical score nor the one with the highest financial score will necessarily be accepted. The responsive bid with the highest combined score will be recommended for award of a contract.
- 4.4.7 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.
- 4.4.8 In the event of identical Total Bidder Scores, then the bid with the highest Technical Score will be recommended for award of a contract.

PART 5 CERTIFICATIONS

Bidders must provide the required certifications and documentation to be awarded a contract.

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default, if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with this request will also render the bid non-responsive or will constitute a default under the Contract.

5.1 Mandatory Certifications Required Precedent to Contract Award

5.1.1 Code of Conduct and Certifications – Related documentation

By submitting a bid, the Bidder certifies that the Bidder and its affiliates are in compliance with the provisions as stated in Section 01 Code of Conduct and Certifications – Bid of Standard Instructions 2003. The related documentation therein required will assist Canada in confirming that the certifications are true.

5.1.2 Federal Contractors Program for Employment Equity – Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from Human Resources and Skills Development Canada (HRSDC) – Labour's website.

Canada will have the right to declare a bid non-responsive if the Bidder appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity – Certification, before contract award.

5.2 Additional Certifications 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.

5.2.1 Price Certification

In the event that this RFP results in only one bid being received, any resulting contract awarded will contain the following price certification terms. The Bidder must agree to these terms in order to be awarded the contract.

5.2.1.1 Price Certification - Canadian-based Suppliers (other than agency and resale outlets)

5.2.1.1.1 The Bidder certifies that the price proposed:



5.2.1.1.1.1 is not in excess of the lowest price charged anyone else, including the Bidder's most favoured customer, for the like quality and quantity of the goods, services or both;

5.2.1.1.1.2 does not include an element of profit on the sale in excess of that normally obtained by the Bidder on the sale of goods, services or both of like quality and quantity, and

5.2.1.1.1.3 does not include any provision for discounts to selling agents.

5.2.1.2 Price Certification - Foreign Suppliers

5.2.1.2.1 The Bidder certifies that the price proposed is not in excess of the lowest price charged anyone else, including the Bidder's most favoured customer, for the like quality and quantity of the goods, services or both.

5.2.2. Code of Conduct Certifications – Certifications Required Precedent to Contract Award

5.2.2.1 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.

5.2.2.2 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 SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

6.1.1 Before award of a contract, the following conditions must be met:

6.1.1.1 the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses; and

6.1.1.2 the Bidder must provide the address(es) of proposed location(s) of work performance or document safeguarding as indicated in Part 3 – Section IV Additional Information.

6.1.2 Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.

6.1.3 For additional information on security requirements, bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions to Bidders" document (<http://tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) on the Departmental Standard Procurement Documents Website.

6.2 Financial Capability

6.2.1 SACC Manual clause A9033T (2012-07-16) Financial Capability applies, except that subsection 3 is deleted and replaced with the following: "If the Bidder is a subsidiary of another company, then any financial information required by the Contracting Authority in 1(a) to (f) must also be provided by each level of parent company, up to and including the ultimate parent company. The financial information of a parent company does not satisfy the requirement for the provision of the financial information of the Bidder; however, if the Bidder is a subsidiary of a company and, in the normal course of business, the required financial information is not generated separately for the subsidiary, the financial information of the parent company must be provided. If Canada determines that the Bidder is not financially capable but the parent company is, or if Canada is unable to perform a separate assessment of the Bidder's financial capability because its financial information has been combined with its parent's, Canada may, in its sole discretion, award the contract to the Bidder on the condition that one or more parent companies grant a performance guarantee to Canada."

<p>Note to Bidders: This financial information is only to be submitted following explicit written request by the Contracting Authority; it is however, mandatory on request.</p>



PART 7 RESULTING CONTRACT CLAUSES

The following clauses apply to and form part of any contract resulting from the bid solicitation.

7.1 Requirement

7.1.1 _____ (the "Contractor") agrees to supply to the Client the goods and 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 market studies, as and when requested by Canada.

Client: Under the Contract, the "Client" is Shared Services Canada ("SSC"), an organization with a mandate to provide shared services.

7.1.2 **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.

7.1.3 **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.

7.2 Task Authorization

7.2.1 **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.

7.2.2 **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, and C of Annex A.

7.2.3 Form and Content of Task Authorization:

7.2.3.1 The Technical Authority will provide the Contractor with a description of the task using the "Task Authorization" form specified in Appendix B of Annex A – Task Authorization Request and Acceptance Form, and in conformity with the Task Authorization Procedures as set out in Appendix A to Annex A.

7.2.3.2 The Task Authorization will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis (bases) and methods of payment as specified in the Contract.

7.2.4 Task Authorization Authorities for Validly Issuing Task Authorizations:

7.2.4.1 To be validly issued, a TA must be signed by both the Technical Authority and the Contracting Authority before issuance.

7.2.4.2 The Contractor must not commence work until a TA authorized in accordance with all the provisions of this Article has been received by the Contractor.

Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If



the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority.

7.2.5 **Periodic Usage Reports:**

7.2.5.1 The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If any required information is not available, the Contractor must indicate the reason. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The Contractor must submit usage reports on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.

7.2.5.2 The quarterly periods are defined as follows:

- a) 1st quarter: April 1 to June 30;
- b) 2nd quarter: July 1 to September 30;
- c) 3rd quarter: October 1 to December 31; and
- d) 4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than ten (10) calendar days after the end of the reporting period.

7.2.5.3 Each report must contain the following information for each validly issued TA (as amended):

- 7.2.5.3.1 the Task Authorization number and the Task Authorization Revision number(s), if applicable;
- 7.2.5.3.2 a title or a brief description of the task;
- 7.2.5.3.3 the name, Category of Personnel and level of each resource involved in performing the TA, as applicable;
- 7.2.5.3.4 the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
- 7.2.5.3.5 the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- 7.2.5.3.6 the start and completion date for each authorized task; and
- 7.2.5.3.7 the active status of each authorized task as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).

7.2.5.4 Each report must also contain the following cumulative information for all the validly issued TAs (as amended)

- 7.2.5.4.1 the amount (exclusive of Applicable Taxes) specified in the contract (as last amended, as applicable) as Canada's total liability to the contractor for all authorized TAs; and
- 7.2.5.4.2 the total amount, exclusive of Applicable Taxes, expended to date against all validly issued tasks.

7.2.6 **Refusal of Task Authorizations:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. A valid response is one that is submitted within the required time period and meets all requirements of the TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the TA at pricing not exceeding the rates set



out in Annex B – Basis of Payment. Each time the Contractor does not submit a valid response, the Contractor agrees Canada may at its option decrease the Minimum Contract Value in the clause titled “Minimum Work Guarantee” by 1%. This decrease will be evidenced for administrative purposes only through a contract amendment issued by the Contracting Authority (which does not require the agreement of the Contractor).

7.2.7 Consolidation of TAs for Administrative Purposes: The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TAs for administrative purposes.

7.3 Minimum Work Guarantee

7.3.1 In this clause,

7.3.1.1 “Maximum Contract Value” means the amount specified in the “Limitation of Expenditure” clause set out in the Contract (excluding applicable taxes); and

7.3.1.2 “Minimum Contract Value” means the value of the Workplace Technology Devices Market Study as per the pricing table found in Annex B Basis of Payment.

7.3.2 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 3. 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.

7.3.3 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.

7.3.4 Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract

7.3.4.1 for default;

7.3.4.2 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

7.3.4.3 for convenience within ten business days of Contract award.

7.4 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://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada. All references contained within the General Conditions or Supplementary General Conditions to the Minister of Public Works and Government Services will be interpreted as a reference to the minister presiding over Shared Services Canada and all references to the Department of Public Works and Government Services will be interpreted as Shared Services Canada.

For purposes of this contract the PWGSC policies referenced within the Standard Acquisitions Clauses and Conditions Manual are adopted as SSC policies.

7.4.1 General Conditions:

7.4.1.1 2035 (2013-06-27), General Conditions - Higher Complexity – Services, apply to and form part of the Contract. These General Conditions are amended as follows:

Section 2 of the General Conditions is amended as follows: delete “Pursuant to the *Department of Public Works and Government Services Act*, S.C. 1996, c.16”

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.

7.4.2 Supplemental General Conditions

7.4.2.1 4006 (2010-06-16), Contractor to Own IP Rights in Foreground Information, apply to and form part of the Contract.

7.5 Security Requirement:

The following security requirement (SCRL and related clauses) applies and forms part of the Contract.

7.5.1 Security Requirement for Canadian Supplier:

7.5.1.1 The contractor and/or its employees must EACH maintain a valid SECRET level security clearance, granted by Canada and approved by Shared Services Canada.

7.5.1.2 The contractor and/or its employees MUST NOT remove any PROTECTED or CLASSIFIED information or assets from the identified work site(s).

7.5.1.3 The contractor and/or its employees MUST NOT use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data.

7.5.1.4 Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of Shared Services Canada.

7.5.1.5 The contractor and its employees must comply with the provisions of the:

- (a) Justice Canada – Security of Information Act (Latest Edition);
- (b) Industrial Security Manual (Latest Edition).

7.5.2 Security Requirement for Foreign Supplier:

7.5.2.1 The Canadian Designated Security Authority (Canadian DSA) for industrial security matters in Canada is the Director International Industrial Security Directorate (IISD), Public Works and Government Services Canada (PWGSC).

7.5.2.2. Further specification respecting the security requirements listed above may be provided in order to ensure compatibility with security measures for access to sensitive information/assets, as part of this Contract.

7.5.2.3 Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the Canadian DSA.

7.5.2.4 The proponent Foreign recipient Contractor must identify an authorized Contract Security Officer (CSO) to be responsible for the overseeing of the security requirements, as defined in this Contract. This individual will be appointed by the proponent Foreign recipient Contractor's Chief Executive officer or Designated Key Senior Official, defined as an owner, officer, director, executive, and or partner who occupy a position which would enable to adversely affect the organization's policies or practices in the performance of the contract.

7.5.2.5 Sensitive information/assets, as part of this Contract, shall be released only to the proponent Foreign recipient Contractor personnel, who have a need-to-know for the performance of this Contract and who have a **Personnel Security Clearance** at an equivalent level, granted by their respective country National Security Authority (NSA)/DSA, in accordance with the National Policies of the Foreign recipient bidder's country.

7.5.2.6 The proponent Foreign recipient Contractor, intending or required to visit a Canadian Government restricted site, or industrial facilities, will submit a Request for Visit form to the Canadian DSA, through their respective country NSA/DSA.

7.5.2.7 The proponent foreign recipient Contractor shall contact their respective country NSA/DSA in order to comply with the provisions of the Bilateral Industrial Security Memorandum of Understanding between the proponent foreign recipient Contractor's



NSA/DSA and the Government of Canada, in relation to sensitive information/ assets equivalencies.

7.5.2.8 In the event that a proponent Foreign recipient Contractor is chosen as a supplier for this Contract, subsequent Country-specific Foreign security requirement clauses shall be generated and promulgated by the Canadian DSA, and provided to the Government of Canada Contracting Authority, to reflect compliance of the security provisions, as defined by the Canadian DSA, in relation to equivalencies.

7.5.2.9 The Government of Canada will not delay the award of this Contract if the proponent Foreign recipient Contractor does not possess the required security level clearances, at time of bid closing. Nevertheless, a chosen Foreign recipient Contractor is required to meet all contract security requirements at time of contract award.

7.6 Contract Period

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

7.6.1.1 The “**Initial Contract Period**”, which begins on the date the Contract is awarded and ends one (1) year later; and

7.6.1.2 The period during which the Contract is extended, if Canada chooses to exercise any options (if any) set out in the Contract.

7.6.2 Option to Extend the Contract:

7.6.2.1 The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one-year period(s) under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.

7.6.2.2 Canada may exercise this option at any time by sending a written notice to the Contractor at least ten (10) calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

7.7. Authorities

7.7.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Christopher Farinaccio
Title: Supply Officer

Shared Services Canada
Procurement and Vendor Relationships
255 Albert St
Ottawa K1G 4A8
Telephone: 613-410-3206
E-mail address: christopher.farinaccio@ssc-spc.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.

7.7.2 Technical Authority

The Technical Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____



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

The Technical Authority 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.

7.7.3 Contractor's Representative

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

7.8 Payment

7.8.1 Basis of Payment

7.8.1.1 Professional Services provided under a Task Authorization with a Maximum Price: For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B – Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.

7.8.1.2 Professional Services provided under a Task Authorization with a Firm Lot Price: For professional services or market studies requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in Annex B: Basis of Payment), Applicable Taxes extra.

7.8.1.3 Firm Lot Price – Deliverables

For the Work described in the Statement of Work in Annex A:

In consideration of the Contractor satisfactorily completing its obligations under the Contract, the Contractor will be paid a firm lot price for the cost identified in Annex B: Basis of Payment. Customs duties are included and Applicable Taxes are extra.

For the firm price portion of the Work only, 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.

7.8.1.4 Pre-Authorized Travel and Living Expenses: Canada will reimburse the Contractor for its pre-authorized travel and living expenses reasonably and properly incurred in the performance of the Work [outside the National Capital Area], at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the Treasury Board Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". All travel must have the prior authorization both the Technical Authority and Contracting Authority. All payments are subject to government audit. The Contractor will not be able to charge for time spent travelling at the per diem rates set out in the Contract.

7.8.1.5 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.

7.8.1.6 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 goods or services in these amounts. Any commitment to purchase specific amounts or values of goods or services is described elsewhere in the Contract.

7.8.1.7 Professional Services Rates: In Canada's experience, bidders 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. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

7.8.2 Limitation of Expenditure

7.8.2.1 Canada's total liability to the Contractor under the Contract must not exceed the amount set out on page 1 of the Contract, less any Applicable Taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are included and Applicable Taxes are included, if applicable. Any commitments to purchase specific amounts or values of goods or services are described elsewhere in the Contract.

7.8.2.2 No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum when:

7.8.2.2.1 it is 75 percent committed, or

7.8.2.2.2 4 months before the Contract expiry date, or

7.8.2.2.3 as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,
whichever comes first.

7.8.2.3 If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

7.8.3 Method of Payment

7.8.3.1 Method of Payment for Task Authorizations with a Maximum Price: For each Task Authorization validly issued under the Contract that contains a maximum price:

7.8.3.1.1 Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.



7.8.3.1.2 Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related TA.

7.8.4 **Method of Payment for Deliverables and Task Authorizations with a Firm Lot Price:** Canada will pay the Contractor upon completion and delivery of the Work 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.

7.8.4.1 **No Responsibility to Pay for Work not performed due to Closure of Government Offices**

7.8.4.2 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.

7.8.4.3 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.

7.9 **Discretionary Audit - Commercial Goods and/or Services**

7.9.1 The Contractor's certification that the price or rate is not in excess of the lowest price or rate charged anyone else, including the Contractor's most favoured customer, for the like quality and quantity of the goods, services or both, is subject to verification by government audit, at the discretion of Canada, before or after payment is made to the Contractor.

7.9.2 If the audit demonstrates that the certification is in error after payment is made to the Contractor, the Contractor must, at the discretion of Canada, make repayment to Canada in the amount found to be in excess of the lowest price or rate or authorize the retention by Canada of that amount by way of deduction from any sum of money that may be due or payable to the Contractor pursuant to the Contract.

7.9.3 If the audit demonstrates that the certification is in error before payment is made, the Contractor agrees that any pending invoice will be adjusted by Canada in accordance with the results of the audit. It is further agreed that if the Contract is still in effect at the time of the verification, the price or rate will be lowered in accordance with the results of the audit.

7.10 **Invoicing Instructions**

7.10.1 The Contractor must submit invoices in accordance with the information required in the General Conditions.

7.10.2 The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision.

7.10.3 By submitting invoices the Contractor is certifying that the goods and services 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.



7.10.4 The Contractor must provide the original of each invoice to the Technical Authority, and a copy to the Contracting Authority upon request.

7.11 **Certifications**

7.11.1 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.

7.11.2 **Federal Contractors Program for Employment Equity – Default by the Contractor**

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and HRSDC-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by HRSDC will constitute the Contractor in default as per the terms of the Contract.

7.12 **Applicable Laws**

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

7.13 **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:

7.13.1 these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;

7.13.2 Supplemental General Conditions, in the following order:

7.13.2.1 4006 (2010-08-16);

7.13.3 General Conditions 2035 (2013-06-27);

7.13.4 Annex A, Statement of Work, including its Appendices as follows;

7.13.4.1 Appendix A to Annex A – Task Authorization Procedures;

7.13.4.2 Appendix B to Annex A – Task Authorization Request and Acceptance Form; and

7.13.4.3 Appendix C to Annex A – Certification at the Task Authorization Stage;

7.13.5 Annex B, Basis of Payment;

7.13.6 Annex C, Security Requirements Check List;

7.13.6.1 Annex D, Federal Contractors Program for Employment Equity – Certification (if applicable);

7.13.7 the signed Task Authorizations;

7.13.8 the Contractor's bid dated _____, as amended _____, 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.

7.14 **Foreign Nationals (Canadian Contractor)**

7.14.1 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.

7.15 Foreign Nationals (Foreign Contractor)

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

7.16 Insurance Requirements

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

7.17 Professional Services - General

7.17.1 The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.

7.17.2 If the Contractor fails to deliver any deliverable (excluding delivery of an individual) or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within ten working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.

7.17.3 In General Conditions 2035, Article 08 is deleted and the following applies instead:

7.17.3.1 If a specific individual is identified in the Contract to perform the Work, the Contractor must provide his or her services within ten working days of the issuance of the Contract or full execution of the Task Authorization (whichever first contains instructions for that individual to commence Work) unless the Contractor is unable to do so due to the sickness, death, extended leave (including parental leave or disability leave), retirement, resignation or dismissal for cause of the individual.

7.17.3.2 If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, within five working days of the departure of an existing resource (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) the Contractor must provide to the Contracting Authority:

7.17.3.2.1 the name, qualifications and experience of a proposed replacement immediately available for work; and

7.17.3.2.2 proof that the proposed replacement has the required security clearance granted by Canada, if applicable.

The replacement must have qualifications and experience that meet or exceed the score obtained for the original resource.

7.17.3.3 Where Canada becomes aware that an individual identified under the Contract to provide the services has not been provided or is not performing, the Contracting Authority may elect to:

7.17.3.3.1 exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract for default, or



7.17.3.3.2 require the Contractor propose a replacement acceptable to Canada to be rated by the Technical Authority. The replacement must have qualifications and experience that meet or exceed the score obtained for the original resource.

7.17.3.4 The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that a resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order that a resource stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.

7.17.3.5 The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

7.18 Safeguarding Electronic Media

7.18.1 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.

7.18.2 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.

7.19 Representations and Warranties

The Contractor made statements regarding its and its proposed resources experience and expertise in its bid that resulted in the award of the Contract and the issuance of TAs. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract and adding work to it through TAs. 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.

7.20 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.

7.21 Contractor's Identification Protocol Responsibility

The Contractor will be responsible for ensuring that each of its agents, representatives or subcontractors (hereinafter referred to as the Contractor Representatives) complies with the following self identification requirements:

7.21.1 Contractor Representatives who attend a Government of Canada meeting whether internal or external to Canada's offices must identify if an individual is not a permanent employee of the Contractor prior to the commencement of the meeting to ensure that each meeting participant is aware of the fact that the individual is not a Contractor permanent employee;

7.21.2 During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and

7.21.3 If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under



“Properties.” This identification protocol must also be used in all other correspondence, communication, and documentation.

- 7.21.4 If the Contractor is, in Canada's determination, in breach of any obligation stated in this Article, upon written notice from Canada, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have 5 working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.
- 7.21.5 In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

7.22 Termination for Convenience

- 7.22.1 With respect to Section 30 of General Conditions 2035, if applicable, subsection 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.



SHARED SERVICES CANADA

MARKET STUDY

ANNEX A – STATEMENT OF WORK

1. OVERVIEW

Shared Services Canada (SSC) currently supports 485 data centres, 50 wide area networks, and 63 discrete email systems. SSC's mandate is to consolidate and modernize this Information Technology (IT) infrastructure to achieve better value and to provide improved and more secure services to Canadians. SSC's transformation programs aim to achieve efficiencies, reduce costs, minimize risks, and improve service quality of Government of Canada (GC) IT services by establishing a common service delivery model, that includes four key elements: 1) centralized administration; 2) IT infrastructure consolidation; 3) facilities consolidation; and, 4) alternative service delivery provisions that can include outsourcing.

SSC requires the expert services of a market research firm to support its market analysis activities. The objective of this requirement is to award one contract to acquire market research and analysis, and related services to support ongoing SSC and GC transformation activities on an 'as-and-when' requested basis.

Understanding the marketplace and measuring the impacts of SSC's transformation initiatives is critical to the success of SSC's transformation. SSC is continuously seeking to broaden and increase its knowledge of the Canadian IT sector and the impact of federal contracts on its landscape. Over the past year, SSC has engaged stakeholders including suppliers and industry associations through a variety of avenues such as the Information Technology Industry Roundtable (ITIR). While SSC's engagement activities moderately address the market's landscape and the impacts of government contracting, no focused study of the market has been undertaken by SSC through a cost-benefit or socioeconomic lens.

2. BACKGROUND

The Government of Canada created Shared Services Canada (SSC) on August 4, 2011, to fundamentally transform how the Government manages its information technology (IT) infrastructure. The creation of SSC brought together people, technology resources and assets from the 43 federal departments and agencies to improve the efficiency, reliability and security of the Government's IT infrastructure. A more efficient use of technology will increase productivity across departments, help build a more modern public service and provide improved and more secure services to Canadians.

SSC is mandated to deliver email, data centre and network/telecom services to 43 Government of Canada (GC) institutions representing 95 per cent of the federal IT infrastructure spending. Although SSC's first obligation is to ensure the sustainability of the IT infrastructure, SSC is also required to transform the existing environment into a consolidated enterprise model for the whole of Government and, 1) realize material cost savings and avoid future costs, 2) match service levels to all partner and GC priorities, and 3) provide a secure environment to meet program needs. In April 2013, SSC's responsibilities were expanded to include services relating to the acquisition and provisioning of hardware and software for workplace technology devices, including security software.

Prior to the establishment of Shared Services Canada, departments and agencies were responsible for the management and operation of their individual data centres, networks, and information technology infrastructure. Although this model provided the maximum flexibility for individual departments and agencies to manage their respective IT infrastructure, it resulted in the following conditions across the Government of Canada:

- a) Overall inefficiencies in the management of IT infrastructure;
- b) Aging IT infrastructure;
- c) Due to the diversity of IT Infrastructure, longer implementation times are usually required to meet increasing demand for new program services;
- d) Difficulty to easily interconnect programs and share information between departments;
- e) Inconsistent service delivery to Canadians;
- f) Inconsistent security posture for the protection of Canadian information; and
- g) Escalating capital and ongoing cost for the management and operation of data centres and IT infrastructure.

SSC has launched five (5) transformation programs.

Email Transformation Initiative (ETI)

The Email Transformation Initiative will, over the next two years, replace the GC's 63 distinct email systems with one secure, reliable and cost-effective email system. For more information please see <http://www.ssc-spc.gc.ca/pages/ml-crll-eng.html>.

Data Centre Consolidation (DCC) Program

The DCC program will see the development of strategic sourcing solutions and business architecture for the delivery of transformed data centre services. For more information please see <http://www.ssc-spc.gc.ca/pages/dc-cd-eng.html>.

Telecommunications Transformation Program (TTP)

The TTP will modernize and harmonize the GC's telecommunications infrastructure. In the process, security will be improved and costs will be reduced. SSC's objective is to design and build an integrated telecommunications network to support GC operations from coast to coast and internationally. For more information please see <http://www.ssc-spc.gc.ca/pages/telecomm-eng.html>.

Cyber and Information Technology Security (CITS) Transformation

Cyber and Information Technology Security Transformation is responsible for the development of plans and designs for Government of Canada IT infrastructure, cyber and IT security services and for Government of Canada secret infrastructure, within SSC's mandate. SSC is taking important steps to protect the integrity, accessibility and reliability of the Government of Canada's IT infrastructure, and the personal information of Canadians. For more information please see http://ssc.gc.ca/pages/ibp-pai-2012-2013-eng.html#C4_4.

Workplace Technology Devices (WTD)

On April 3, 2013, SSC was given the mandate to provide services related to the procurement of hardware and software, including security software, for workplace technology devices. WTD software includes operating systems, office productivity suite (MS-Word, Excel, PowerPoint), and security software. WTD hardware includes client computers/desktop workstations, laptops, notebooks, tablets and peripherals such as printers.

While providing support services remains the responsibility of partners and clients, SSC is also exploring how WTD support services may be modernized, with a particular focus on reducing costs and improving the user experience while maintaining data and network security. WTD support services could include help desks, desk-side support, break-fix, image engineering and file/print services. It could potentially also include software and hardware provisioning. For more information please see <http://www.ssc-spc.gc.ca/pages/devices-appareils-eng.html>.

3. SCOPE

a. Study Objectives

The market assessment must examine the wide range of impacts on the Canadian IT marketplace that could result from SSC transformation initiatives, proposals under consideration, or potential contracts. The Contractor must, at a minimum, address the following in the draft and final reports:

- i. Quantify net public economic benefits accruing from potential SSC contracts with IT vendors in the field in question (related to the SSC Transformation Initiative);
- ii. Offer a broad narrative of the extent to which SSC and its Transformation Initiative will enable the generation of value for all Canadians;



- iii. Characterize the economic roles of SSC and its Transformation Initiative;
- iv. Discuss implications and provide recommendations to SSC to inform future decisions regarding the Transformation Initiative (i.e, sourcing options, policy-making, program design, etc);
- v. Identify and discuss best practices or other success factors that may be useful for the Transformation Initiative; and
- vi. Identify and discuss the current economic landscape for the specified market segment and potential impacts of SSC's Transformation Initiative including employment (jobs and income), business volumes and financial revenues by:
 - a. Geographic location, this may be by province, region and/or city (for WTD, the Contractor must, at a minimum, provide information by region);
 - b. Service segment (for example, for WTD, service segments could include Help Desk, Desk Side Support, Engineering, Hardware Provisioning, and Software Installation);
 - c. Company Classification by type (for example, for WTD, company classifications could include Independent Software Vendors, Value Added Resellers, Hardware Manufacturers, Software Publishers, and Systems Integrators) and company size (e.g. small, medium, large enterprises); and
 - d. Customer Type (this must include at a minimum the Government of Canada , other public sectors in Canada, and the private sector).

Other issues may be identified in conjunction with the Contractor as required.

b. Study Elements:

Key elements to be addressed must include, and may not be limited to the following:

- i. Interview key stakeholders (identified by SSC as well as by the Contractor) to gain an understanding of the Transformation Initiative's scope, market, and the elements under consideration by SSC;
- ii. Identify information sources and collect detailed data to quantify the historical and current market in Canada. Sources should include Statistics Canada, Industry Canada, Public Works and Government Services Canada and other public and commercial sources;
- iii. Model the size of the market today, by major industry segment and by region in Canada. Industry segments should include service segments and company classification; and
- iv. Develop a predictive model to assess possible changes and impacts on the market based on various elements such as service delivery and sourcing models under consideration by SSC.

The Contractor must ensure that its proposed timelines include time for consultation with SSC, central agencies and stakeholders, as well as other experts in the field, as identified by the Contractor and SSC.

c. Deliverables

The Contractor must provide the following deliverables for each market analysis. Deadlines below pertain to the WTD initiative, which will be the first initiative for which these services will be procured.

- i. Market Study Table of Contents – A draft copy of the proposed table of contents. SSC will provide feedback to be incorporated into the report. For the WTD initiative, this deliverable must be submitted as part of the Contractor's proposal
- ii. Market Study Draft Report – A draft copy of the final document. SSC will provide feedback to be incorporated into the final document. For the WTD initiative, this deliverable will be required by March 24, 2014.
- iii. Market Study Final Report – A final copy of the final document. For the WTD initiative, this deliverable will be required by April 21, 2014.
- iv. Market Study Sensitivity Model – A Microsoft Excel model for the specified IT market in Canada, segregated by service segment, company classification and region. Sensitivity parameters are to be included in order to model projected market changes and impacts based on various sourcing and service delivery scenarios under consideration by SSC. For



- the WTD initiative, a draft of this deliverable will be required by March 24, 2014 and a final copy by April 21, 2014.
- v. Executive Summary Presentation – A Microsoft PowerPoint presentation summarizing the findings of the WTD Industry Market Study. This deliverable will be presented by the Contractor to SSC management by April 21, 2014.

4. CATEGORIES OF PERSONNEL

SSC may require services related to a Market Study, but outside of work required above in Section 3: Scope. These services will be on an 'as-and-when' requested basis through the use of Task Authorizations to call up the specific Contractor identified categories of personnel. These Task Authorizations may be used for work such as providing market related advisory services to SSC, updating a previously completed and accepted Market Study or adding elements to a Market Study that are not included in this Statement of Work or a resulting Firm Lot Price Task Authorization.

The following categories of personnel may be required on an 'as-and-when' requested basis:

- a) *Senior Market Research Specialist*
A Senior Level Specialist is defined as having more than 10 years of applied experience in the specified domain of expertise.
- b) *Intermediate Market Research Specialist*
An Intermediate Level Specialist is defined as having 6 to 10 years of applied experience in the specified domain of expertise.
- c) *Junior Market Research Specialist*
A Junior Level Specialist is defined as having 3 to 5 years of applied experience in the specified domain of expertise.

5. LANGUAGE OF WORK

The Contractor will provide the WTD Industry Market Study in English. French may be required for research/interviews.

6. LOCATION OF WORK

The Contractor may be required to attend meetings, briefings and conduct research at various locations throughout the National Capital Region. In situations where the nature of the work requires access to the SSC network in order to perform their specified tasks, SSC will provide the Contractor's personnel with any required desktop computing devices.

There may be requirements to conduct work outside of the National Capital Region.

7. TRAVEL REQUIREMENTS

The Contractor must be able to travel and provide Work across Canada as requested. Canada will not pay the Contractor for any travel and/or living expenses associated with performing the Work in the National Capital Region.

Canada will reimburse the Contractor for its pre-authorized travel and living expenses as set out in the Contract.

8. ORDERING:

- a. The first initiative to procure these services will be the WTD initiative. The WTD market study is a Firm Lot Price Deliverable included in the Contract.
- b. Any other of SSC's initiatives may request a market study under the Contract by using a Firm Lot Price Task Authorization.

- c. Any of SSC's initiatives may request professional services for the categories included in the Contract on an as and when requested basis by using a Maximum Price Task Authorization

9. ADDITIONAL INFORMATION SPECIFIC TO THE WORKPLACE WTD MARKET STUDY:

On April 3, 2013, SSC was given the mandate to provide services related to the acquisition and provision of hardware and software, including security software, for workplace technology devices. The focus of the first Industry Market Study is on the Workplace Technology Devices support services market.

a. Current State

The Government of Canada (GC) spends an estimated \$660 million dollars annually on WTD hardware, software and support. About half of the costs are in software and hardware procurement and the other in support service delivery. There are approximately 400,000 devices used by about 283,000 federal public servants. On a per device basis, costs are approximately \$1,650, which represents the full asset life cycle (hardware, software and support). In contrast, industry benchmarks are around \$1,000 to \$1,200 per device (based on Gartner research data) and continue to drop. Historically, WTD expenditures have been managed on a department by department basis. This decentralized approach to the management of end user devices contributes to a number of inefficiencies, including loss of economies of scale and reduced purchasing power.

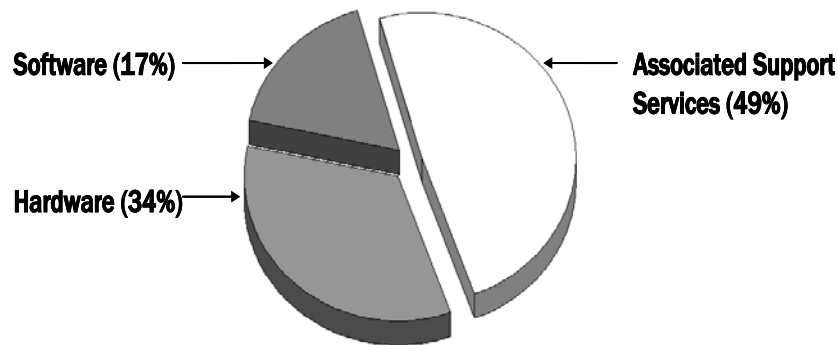


Figure 1: Breakdown of Current Costs

b. Objectives

Over the next 12 to 24 months, SSC will be analyzing a range of service delivery and sourcing models for the WTD services delivered to departments. Financial information and a predictive sensitivity model are required to understand how the market is currently growing (or shrinking) and the possible changes and impact to the market based on up to 10 different service delivery and sourcing scenarios that may be considered by SSC.



APPENDIX A TO ANNEX A

TASK AUTHORIZATION PROCEDURES

1. Task Authorization (TA) Request

- a. Where a requirement for a specific task has been identified and a TA is to be provided to the Contractor in accordance with the methodology described in the Contract Article titled "Task Authorization", a TA Form, as attached at Appendix B to Annex A, will be prepared by the Technical Authority and sent to the Contractor.
- b. A TA Form will contain the following information, if applicable:
 - i. the task number;
 - ii. the date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
 - iii. the details of any financial coding to be used;
 - iv. the categories of resources and the number required;
 - v. a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - vi. the start and completion dates;
 - vii. milestone dates for deliverables and payments (if applicable);
 - viii. the number of person-days of effort required;
 - ix. whether the work requires on-site activities and the location;
 - x. the language profile of the resources required;
 - xi. the level of security clearance required of resources;
 - xii. the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
 - xiii. any other constraints that might affect the completion of the task.

2. TA Quotation

- a. The Contractor must provide the Technical Authority, within 2 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract and must identify the proposed resources. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- b. For each proposed resource the Contractor must supply:
 - i. A resume for the Category(ies) of Personnel and level(s) identified in the TA Form. The Contractor's quotation must demonstrate that each proposed resource meets the mandatory requirements described in the Contract (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - a. Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work.



- b. For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource by the time of bid closing. For post-secondary education, Canada will only accept credentials from institutions recognized by the Department of Education of any Canadian province, or for those obtained in a foreign country, by either of the credential assessment organizations listed on the Website: <http://www.cicic.ca/>
 - c. For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession's governing body throughout the evaluation and Contract Period.
 - d. For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - e. For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the individual's resume does not include the relevant dates for the experience claimed (i.e., the start date and end date).
 - f. For work experience to be considered by Canada, the Contractor's response must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. In situations in which a proposed resource worked at the same time on more than one project, only one project will be counted toward any requirements that relate to the individual's length of experience.
- ii. The following security information:

SECURITY INFORMATION	CONTRACTOR TO INSERT DATA
Name of individual as it appears on security clearance application form	
Level of security clearance obtained	
Validity period of security clearance obtained	
Security Screening Certificate and Briefing Form file number	

- iii. Certifications at Appendix C to Annex A (as applicable).
- c. The quotation must be submitted to the Contracting Authority within the time for response identified in the TA Form. The Contractor will be given a minimum of 2 days turnaround time to submit a quotation.

3. Resource Assessment

- a. Each proposed resource will be assessed for compliance with the mandatory requirements identified in the Statement of Work applicable to that Category of Personnel. Proposed resources that do not comply with each and every mandatory criterion will not be accepted.

Appendix B to Annex A

**Task Authorization Request and Acceptance Form
Sigma Task Authorization form will be accepted as well**

TASK AUTHORIZATION



Contractor: _____		Contract Number: _____	
Contractor PBN: _____			
Commitment Number: _____		Financial Coding: _____	
Task Number: _____		Date: _____	
TA Request (For completion by Technical Authority)			
<p>1. Description of Work to be Performed</p> <p style="text-align: center;">Statement of Work</p> <p style="text-align: center;">Description of any Deliverable(s) required (including the required format and media)</p> <p>Any reporting obligations and deadlines for submitting the reports as they will apply to the resulting Contract will be described here.</p>			
2. PERIOD OF SERVICES	From:	_____	To: _____
3. Work Location			
4. Travel Requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify:		
5. Other Conditions/ Restrains	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify:		
6. Task Proposal (insert rows as required) Check []:	Estimated Cost <input type="checkbox"/> <input type="checkbox"/>	Fixed Price <input type="checkbox"/>	\$ _____
7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR'S PERSONNEL			
<input type="checkbox"/> Reliability Status <input type="checkbox"/> Secret <input type="checkbox"/> Top Secret <input type="checkbox"/> Other			
8. BILINGUALISM (if applicable)			
<input type="checkbox"/> English and French <input type="checkbox"/> French <input type="checkbox"/> English If both, the categories of personnel requiring bilingualism include:			



TA Proposal [For completion by Contractor]			
9. Estimated Cost Contract			
Category (Level) and Name of Proposed Resource	Firm Per Diem Rate	Estimated # of Days	Total cost
Professional services estimated cost	Total		
			Applicable Taxes
			Grand Total \$ _____

Travel & Living	Estimated Cost	
		Applicable Taxes
		Total Travel & Living Cost
Grand Total for Labour and Travel		

TA Approval			
10. Signing Authorities			
	Name and Title	Signature	Date
Authorized Individual to sign on Behalf of Contractor :			
Technical Authority :			
Contracting Authority :			
11. Basis of Payment & Invoicing			
<p>In Accordance with the article entitled "Basis of Payment" in the Contract.</p> <p>Payment to be made based on receipt of detailed monthly invoices for services rendered, subject to full acceptance by the Technical Authority. Total of payments not to exceed the grand total.</p> <p>Original invoices shall be sent to the Technical Authority. One copy of each invoice, together with attachments, shall be sent to the Contracting Authority.</p>			



DELIVERABLE ACCEPTANCE
Task Authorization Number: _____
Contract Authority: _____
Date Submitted: [YYYY-MM-DD]
DESCRIPTION OF DELIVERABLE(S)
[A description of the deliverables accepted will be detailed here]
Name of the individual who accepted the deliverable: _____
Title of the individual who accepted the deliverable: _____
Date accepted: [YYYY-MM-DD]
Signature of the individual who accepted the deliverable: _____
Comments:



APPENDIX C TO ANNEX A

CERTIFICATIONS AT THE TASK AUTHORIZATION STAGE

1. Education and Experience

The Contractor certifies that all the information provided in the resume(s) and supporting material submitted, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that the individual(s) proposed is capable of performing the Work described in the Contract. Canada reserves the right to verify any information provided in this regard and to exercise any of its rights granted under the Contract or at law if the proposed resource does not meet the required qualifications.

Print name of authorized individual & sign above

Date

2. Status of Personnel

If the Contractor has proposed any individual in fulfillment of this Contract who is not an employee of the Contractor, the Contractor hereby certifies that it has written permission from that person (or the employer of that person) to propose the services of that person in relation to the work performed in fulfillment of this Contract and to submit that person's resume to Canada. The Contractor must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Contractor.

Print name of authorized individual & sign above

Date

3. Availability of Personnel

The Contractor certifies that, should it be authorized to provide the services under any TA resulting from this Contract, the resource(s) proposed in the TA response will be available to commence performance of the Work within a reasonable time from the date of acceptance of the Task Authorization, or within the time specified in the TA Form, and will remain available to perform the Work in relation to the fulfillment of the requirement.

Print name of authorized individual & sign above

Date

4. Certification of Language

The Contractor certifies that the proposed resource(s) in response to this TA is/are fluent in either English or French, as requested on the TA. The individual(s) proposed is/are able to communicate orally and in writing without any assistance and with minimal errors in English.

Print name of authorized individual & sign above

Date



ANNEX B

BASIS OF PAYMENT

FIRM ALL INCLUSIVE RATE FOR THE CONTRACT PERIOD	
Service Line	FIRM ALL INCLUSIVE RATE
a. Firm Lot Price for the WTD Industry Market Study – Not to exceed \$100,000 CAD	
b. Potential Maximum Firm Lot Price Increase (in %) for all other initiatives as compared to the price in a) above – Not to exceed 50%. To be used for Firm Lot Price Task Authorizations	
c. Per Diem Rate for Senior Market Analyst	
d. Per Diem Rate for Intermediate Market Analyst	
e. Per Diem Rate for Senior Market Analyst	



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
Security Classification / Classification de sécurité UNCLAS

**SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine	2. Branch or Directorate / Direction générale ou Direction	
SHARED SERVICES CANADA TSSD - WTD		
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail THE WORKPLACE TECHNOLOGY DEVICES INITIATIVE OF TRANSFORMATION SERVICE STRATEGY + DESIGN HAS A REQUIREMENT FOR MARKETING RESEARCH AND ANALYSIS SERVICES ON AN AS NEEDED WHEN REQUIRED BASIS. THE FIRM SELECTED WILL HAVE SIGNIFICANT EXPERIENCE IN MARKETING RESEARCH TO SUPPORT TRANSFORMATION.		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui	
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>



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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

- | | | | |
|---|---|--|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL
CONFIDENTIEL | <input checked="" type="checkbox"/> SECRET
SECRET | <input type="checkbox"/> TOP SECRET
TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET - SIGINT
TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL
NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET
NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET
COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS
ACCÈS AUX EMPLACEMENTS | | | |

Special comments:
Commentaires spéciaux :

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No / Non Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui



Government of Canada / Gouvernement du Canada

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PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
 Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.
 Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / Renseignements / Biens / Production	X				X											
IT Media / Support TI																
IT Link / Lien électronique																

MAN

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



ANNEX D

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with such request by Canada will also render the bid non-responsive or will constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit HRSDC-Labour's website.

Date: _____(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a federally regulated employer being subject to the *Employment Equity Act*.
- A4. The Bidder certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and

- A5.1. The Bidder certifies already having a valid and current Agreement to Implement Employment Equity (AIEE) in place with HRSDC-Labour.

OR

- A5.2. The Bidder certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to HRSDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to HRSDC-Labour.

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.

OR

- B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)



ATTACHMENT 3.1 – PRICING TABLES

*Bidders are required to complete the following pricing tables.

The following pricing tables will be used for evaluation purposes only. Bidders are not to interpret these values as a commitment by Canada to procure these goods and services in those amounts.

A) Table A – Firm Lot Price for the WTD Market Study

Bidders must provide a firm lot price for the WTD Market Study. The Firm Lot Price will apply to the WTD Market Study during the Initial Contract period and the Option Period(s) if exercised by Canada. **The Firm Lot Price cannot exceed \$150,000 CAD.**

	Firm Lot Price
WTD Industry Market Assessment	\$ _____

B) Table B – Potential Price Increase (in %) for all other SSC Market Studies as compared to the Firm Lot Price in Table A above

Bidders must provide a Potential Price Increase (in %) for all other SSC initiatives' Market Studies as compared to the Firm Lot Price in Table A above. The Potential Price Increase will apply to the Initial Contract period and the Option Period(s) if exercised by Canada. **The Potential Maximum Firm Lot Price Increase cannot exceed 50%.**

	Potential Maximum Firm Lot Price Increase (in %)
Other Market Studies	_____ %

C) Table C – Senior Market Analyst – Professional Services

The Bidder must provide a firm daily rate for Professional Services. Travel and Living expenses must be in accordance with the Government of Canada – Treasury Board policy.

	Days (LOE)	Firm Daily Rate	Extended Price (days * firm daily rate)
Senior Market Analyst	100	\$ _____	\$ _____

D) Table D – Intermediate Market Analyst – Professional Services

The Bidder must provide a firm daily rate for Professional Services. Travel and Living expenses must be in accordance with the Government of Canada – Treasury Board policy.

	Days (LOE)	Firm Daily Rate	Extended Price (days * firm daily rate)
Intermediate Market Analyst	100	\$ _____	\$ _____

E) Table E – Senior Market Analyst – Professional Services

The Bidder must provide a firm daily rate for Professional Services. Travel and Living expenses must be in accordance with the Government of Canada – Treasury Board policy.

	Days (LOE)	Firm Daily Rate	Extended Price (days * firm daily rate)
Junior Market Analyst	100	\$ _____	\$ _____



F) Total Evaluated Price

The Total Evaluated Price will be calculated as follows:

Formula	Total Evaluated Price
A + 4(A*(1+B)) + (C Extended Price) + (D Extended Price) + (E Extended Price)	\$ _____



ATTACHMENT 4.1 – TECHNICAL CRITERIA

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.9, they can also be used for M.10.

The Shared Services Canada (SSC) evaluation team may contact each reference to verify the information provided in the bid 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
	For M.1 through M.8 inclusively, the Bidder must provide an Approach Document that is no more than 20 pages (single spaced, Times New Romans size 11) that provides a detailed description of the following topics:	
M.1	Bidder's approach and methodology to fulfill the requirements of the SOW. The approach and methodology must be discussed both generically (which can be applied to all SSC Transformation initiatives) as well as in detail as it related to the WTD Market Study.	
M.2	A description of the data sources the Bidder will use for the WTD Market Study.	
M.3	A description of work or approaches from similar studies that will be leveraged by the Bidder for the WTD Market Study.	
M.4	Elements that are additional to those outlined in the SOW which the Bidder will include at no extra cost in its WTD Market Study (value-added elements) and a description of their value to the WTD initiative.	
M.5	A description of milestones in chronological order, from initiation to completion of the WTD Market Study.	
M.6	A description of the key risks to the timelines and quality of the WTD Market Study and how they will be mitigated by the Bidder and/or by SSC.	
M.7	An overview of the organizational plan that includes a description of the key personnel and subject matter experts that will participate in the WTD Market Study.	



Criteria ID	Criteria	Met / Not Met
M.8	The Table of Contents for the WTD Market Study, including a brief description of the content that will be in each section of the WTD Market Study.	
M.9	<p>The Bidder must demonstrate experience leading a minimum of 5 projects (Bidders are requested to number projects 1 to 5), where each project involved all of the following activities:</p> <ul style="list-style-type: none">a. Researching and collecting industry market metrics, indicators and other relevant data for a specific market;b. Interviewing subject matter experts and performing industry analysis to understand the market environment and trends;c. Analyzing historical and current industry market metrics and indicators;d. Developing sensitivity and predictive models to understand changes to the market based on key events or influencers; ande. Developing written Reports and Executive Presentations summarizing key findings. <p>The Bidder must provide customer references for each project.</p>	



2. Point Rated Requirements

Note: Projects used to meet the mandatory criteria can also be used to meet the point rated criteria

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

Rating Table	
0%	Information provided does not address the criterion. Bidder receives 0% of the available points for this criterion.
25%	Information provided demonstrates a minimal understanding that is relevant to the stated criterion. Bidder receives 25% of the available points for this criterion.
50%	Information provided demonstrates understanding for most but not all of the elements of the rated criterion. Bidder receives 50% of the available points for this criterion.
75%	Information provided demonstrates understanding that is relevant to all of the elements of the rated criterion. Bidder receives 75% of the available points for this criterion.
100%	Rated criterion is dealt with in depth, information provided demonstrates a full range of in-depth understanding of all of the elements of the rated criterion. Bidder receives 100% of the available points for this criterion.

Criteria ID	Criteria	Maximum Points Available	Point Scale
R.1	The Bidder demonstrates in its Approach Document that its approach and methodology are comprehensive and appropriate to complete all aspects of the Work.	40	Using the Rating Table above
R.2	The Bidder demonstrates in its Approach Document that it has access to and will use a variety of relevant data sources for the WTD Market Study.	20	Using the Rating Table above
R.3	The Bidder demonstrates in its Approach Document that it has performed and/or has access to previously completed work which will be leveraged to complete the WTD Market Study.	20	Using the Rating Table above



Criteria ID	Criteria	Maximum Points Available	Point Scale
R.4	The Bidder demonstrates in its Approach Document that it will provide value-added elements at no extra cost for the WTD Market Study.	20	Using the Rating Table above
R.5	The Bidder demonstrates in its Approach Document a comprehensive understanding of the key milestones to be achieved in order to complete all aspects of the Work.	10	Using the Rating Table above
R.6	The Bidder demonstrates in its Approach Document that it has a strong understanding of key risks and mitigation strategies related to the completion of the WTD Market Study.	10	Using the Rating Table above
R.7	The Bidder demonstrates in its Approach Document that its proposed assignment of personnel, allocation of responsibilities and level of effort are appropriate in order to complete all aspects of the Work.	10	Using the Rating Table above
R.8	The Bidder demonstrates in its Approach Document that the content to be included in the WTD Market Study will meet the requirements identified in the Statement of Work and that the Bidder understands the requirements of the WTD Market Study and how they apply to the Workplace Technology Devices initiative.	10	Using the Rating Table above
R.9	<p>The Bidder demonstrates experience leading projects which assess an Information Technology Market and which use the approach and methodology listed in the Bidder's response to M1.</p> <p>The Bidder must demonstrate experience using a maximum of 2 projects. Customer References must be provided for each project.</p>	48	24 points per project
R.10	<p>The Bidder demonstrates experience leading projects which assess a Canadian Market and which use the approach and methodology listed in the Bidder's response to M1. .</p> <p>The Bidder must demonstrate experience using a maximum of 2 projects. Customer References must be provided for each project.</p>	48	24 points per project
R.11	<p>The Bidder demonstrates experience leading projects which assess a Market for a Public Sector client, and which use the approach and methodology listed in the Bidder's response to M1.</p> <p>The Bidder must demonstrate experience using a maximum of 2 projects. Customer References must be provided for each project.</p>	48	24 points per project



Criteria ID	Criteria	Maximum Points Available	Point Scale
R.12	The Bidder demonstrates experience leading projects which assess the Canadian Information Technology Market and which use the approach and methodology listed in the Bidder`s response to M1. The Bidder must demonstrate experience using a maximum of 2 projects. Customer References must be provided for each project	96	48 points per project
	Maximum Total Score	380	
	Minimum Score Required (60%)	228	



FORM 1

BID SUBMISSION FORM

BID SUBMISSION FORM	
Bidder's full legal name <i>[Note to Bidders: Bidders who are part of a corporate group should take care to identify the correct corporation as the Bidder.]</i>	
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name
	Title
	Address
	Telephone #
	Fax #
	Email
Bidder's Procurement Business Number (PBN) <i>[see the Standard Instructions 2003]</i> <i>[Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]</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 2 of the bid solicitation entitled Former Public Servant 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 2 entitled "Former Public Servant"
	Is the Bidder a FPS who received a lump sum payment under the terms of a work force adjustment directive? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"
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.]	
Security Clearance Level of Bidder <i>[include both the level and the date it was granted]</i> <i>[Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security</i>	



<i>clearance is not valid for the Bidder.]</i>	
<p>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:</p> <ol style="list-style-type: none">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; and4. 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	



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.9	1 primary					
	1 backup					
	2 primary					
	2 backup					
	3 primary					
	3 backup					
	4 primary					
	4 backup					
	5 primary					
	5 backup					



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.9	1 primary					
	1 backup					
	2 primary					
	2 backup					
R.10	1 primary					
	1 backup					
	2 primary					
	2 backup					
R.11	1 primary					
	1 backup					
	2 primary					
	2 backup					
R.12	1 primary					
	1 backup					
	2 primary					
	2 backup					



FORM 4

SUBSTANTIATION OF TECHNICAL COMPLIANCE CROSS-REFERENCE LIST

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

Point Rated Technical Criteria	Reference to Substantiating Materials included in Bid (Title, Page and reference number)
R.1	
R.2	
R.3	
R.4	
R.5	
R.6	
R.7	
R.8	
R.9	
R.10	
R.11	
R.12	



FORM 5

CODE OF CONDUCT CERTIFICATION FORM

Adresse de courriel /E-mail Address:
Ministère/Department:
Dénomination sociale complète du fournisseur / Complete Legal Name of Supplier
Adresse du fournisseur / Supplier Address
NEA du fournisseur / Supplier PBN
Numéro de la demande de proposition Request for Proposal Number
Membres du conseil d'administration (Utilisez le format - Prénom Nom) Board of Directors (Use format - first name last name)
1. Membre / Director
2. Membre / Director
3. Membre / Director
4. Membre / Director
5. Membre / Director
6. Membre / Director
7. Membre / Director
8. Membre / Director
9. Membre / Director
10. Membre / Director
Autres Membres/ Additional Directors: